

Ep 10 Trevor L

Sun, 4/24 3:55PM 1:03:36

SUMMARY KEYWORDS

estimate, unknowns, problem, variance, wrap, building, prep, client, project, trevor, people, create, projects, optimism, scope, task, fixed, tasks, discipline, estimation

SPEAKERS

Trevor Lohbeer, Francis Wade



Francis Wade 00:10

The Task Management and Time Blocking Podcast, episode 10. Have you ever wondered whether or not you're a time optimist? So you're someone who uses time blocking as a regular technique... You put tasks in your calendar so that you can make realistic commitments. But do you still run into the problem of time optimism, where you're allocating time, but things take far longer than you thought? This creates a ripple effect that affects everything you try to do. How do you even tackle a problem that afflicts almost everyone? Even those who don't use a calendar at all? Tune into this episode, listen to me and my special guests Trevor Lohrbeer as we solve this challenging problem together, welcome to the Task Management and Time Blocking Podcast.



Francis Wade 01:41

Welcome back. And if you're watching this on YouTube, you can see that I have a special guest, Trevor Lohrber, who has joined us. I'm going to introduce Trevor in just a moment. And before I do that, let me just remind you, if this is your first time listening to this particular podcast, it's a little bit different from the others that kind of are kicking around out there. Why? Well, because we are looking to solve a problem or challenge that people in the world of task management or time blocking frequently come across or have. So we spend the first time part of the episode actually defining the problem, kicking it around...looking at why it exists. What are some of the knock on effects, why it's hard to solve all the ramifications of the issue at hand. Then we switch gears, and we go into solutions, the tools. And it's a joint problem solving... a joint brainstorming session in which we're trying to find, believe it or not something that neither of us knew before the conversation started -something brand new. And if that's something brand new happens and comes about, you're going to hear this sound a bell, which is we've found something it's like finding gold, right Trevor. If we don't uncover anything, nothing bad, nothing wrong, but you will hear a buzzer at the very end, which means that we had a great time had a great conversation, you probably got something from it. And we didn't have to come across anything brand new. Nothing wrong with that.



Francis Wade 03:14

So let's start off with a story. A month or so before the Smith Project wraps up, Your client gives you a call. "Can you start working on the new King Project right away, like next Monday. It's a fixed bid. So the dollars are already set. And we're going to be using a brand new technology that no one has ever used before...new stuff!"



Francis Wade 03:42

You pause. This isn't your first rodeo. And this client, this client accounts for more than half of your revenue. But in the back of your mind, you know that your current workload is just about full. You're about to say yes. When you remember...The reason I'm not available is that the Smith Project is actually taking me six weeks longer than I thought. And I'm losing money on it as a result, like half my rates. I'm working on the Smith Project, basically half time for free and then being paid. So you say to your client, "Can I sleep on it?"



Francis Wade 04:32

And he says, "Sure, but listen, I need to know by tomorrow. Why? My back is against the wall. My boss... he's all over me. And he needs an answer. And we have to get someone in to help us out.?"



Francis Wade 04:47

If that story sounds familiar...It may be because it's an everyday occurrence in which we get ourselves in all kinds of trouble because of time optimism. So, let me introduce Trevor. He's the founder of DayOptimizer. It's a web app that helps freelancers and entrepreneurs create a daily plan that reflects their priorities using guided workflows design their own neuroscience principles. He also was created Strategic Life Tools, which is a membership site with tools for lack planning and Lean decisions decision making, I think. He also has a blog that teaches people concepts and techniques to make better decisions. Trevor is gonna say bicoastal. But no, he's a bi continental person, lives part of the time in North Carolina the rest of the time in Germany. So he is a swing dancer, he says, I guess it hhe dances the swing in North Carolina. And he's working towards his B2 fluency when he's in Germany. Trevor, is that an accurate description of who you are? And why you're here?




Trevor Lohbeer 04:54

Yes, although I dance swing all over the world. And I also study my German wherever I am.



Francis Wade 05:59


So is there a swing dancing in Germany? That's the kind of thing we want to know, you know?

 Trevor Lohbeer 06:03

Yes, there's a huge swing dancing community in Berlin. And in fact, last year, I actually taught two classes at the university there. So, yes, we have three levels of swing dancing, that we teach at the university, me and my dance partner.

 Francis Wade 06:16


I know nothing. That uniquely qualifies you to discuss this issue, although I can't figure out why. But here we go. So this problem of time optimism ... Trevor where have you seen it, this business of people making these estimates that are unrealistic and getting into trouble? Is that a problem that you've seen, I'm going to ask our guests, you know, you should really think about this, as we're talking about. And so I invite you as a guest to think, ask yourself, Where have I given estimates that were way too optimistic? That got me into trouble? Or where have I been on the receiving end, or wherever I heard an over optimistic estimate, and all I did was kind of smile and wave. I didn't want to confront the Estimator. Trevor. Have you seen this problem?

 Trevor Lohbeer 07:13

Yes, I mean, I would say the problem exists in at least two different forms. Your the way you were just talking about it, is the problem with explicit estimates, which is a problem of estimation is I'm not good at estimating things. But there's also I think, the problem of implicit estimates, which is when we look at our task lists, and think we can get way more done than we actually can. In that case, we're not necessarily actually estimating, doing any estimation on time, we just look at the list and have this kind of gut feeling like, yeah, I can get all that done. And aren't going through any sort of time estimation or allocation process. And that is also another problem with time optimists where they don't even attempt to even figure out how much time something will take. They just look at it and go, Yeah, I can get it done. But also, like you said, is once you go to the explicit part, is when people then explicitly try to do estimates, they're also then bad at making those estimates as well. So both implicit and explicit time estimates can lead to time optimism.

 Francis Wade 08:22

But we have two versions of the problem. The gut feeling version and the the thinking person's version. Yeah, there is some there is some research, though, that that indicates, I think, Thinking Fast and Slow, if I'm not mistaken, that talks about estimates. And I think one of the authors talks about some research that or a book that they were wanted to write or conference wants to put on anyway, they thought it was going to take a year and it took five years. And these were all PhDs and very, very bright people, and they got the estimate completely wrong. And so there is a growing understanding that when we don't use past data, we make very poor estimates. But that apparently doesn't stop us, does it?

 Trevor Lohbeer 09:08

Um, no, I mean, past data is only useful to the degree that it's applicable to the future. And as

the financial prospectuses are always repeating is past performance is no indication of future returns. So like, what has happened in the past, only works if there is a reason that it is going to be strongly correlated with the future. And often it's not. The phrase "the devils in the details" exists for a reason is that those details often will throw off those correlations to where the past is no longer predictive of the future.



Francis Wade 09:50

Right. So we have an especially difficult case but but at the same time, I imagine that there are those people who say that everything I'm doing is unique, that I can never use data, so I won't even bother to collect it. So that probably is one of the reasons why the problem persist is that people don't even bother to collect the data in the first place?



Trevor Lohbeer 10:13

Now, um, yes, and no, I think there's there's categories of problems where the, you can collect the data, and the data can be accurate. And there's categories of problems where even if you collect the data, it's not going to be accurate. Right. And I think what, one of the second one in particular? Well, I think one of the one of the distinctions that help you determine which category you're in, is, how often you've done the task before in the past, right? So like, how often you yourself have done the task or whoever is going to be doing the task before and has done in the past? What the variance of that in the past has been, right? What is the potential for unknowns or uncertainties in the task? You know? And then what is the does the task have a defined scope or not? So as you move toward less defined scopes, more uncertainties, more variance, and increased newness, or less experience, the ability to predict how long that takes drastically reduces. And so we try to apply I think, too often the lessons from areas where all those things are quite known. It's a clear scope, I've done it all the time, low variance to areas where that's not true. Like the case in the story, but another good example, so many construction projects, go over budget, and you're asking, you wonder, why do they go over budget, when these firms will be doing construction all the time? Well, if you build if you're building a template house, and you know, you've got the same blueprint and say you're building like Levittown, or some sort of like community, or every house is exactly the same thing, then you should get pretty accurate after the, you know, third or fourth house on how long it takes to build the house. It's the same house, there's not too many details, you know, yeah, the lumber might differ a little bit, but it's you're going to be have a very tight variance, it's a tight scope, you know, when the house is done, right? There's shouldn't be too many unknowns. And you're using the same, so using the same construction team. So you actually get like, more efficient over time. So your estimates, actually, we probably come in under budget, hopefully, as you improve. But however, if you are the same builder, and what you're doing is you're building completely different houses, and clients are coming up to you with the blueprints of a house of the head architect do. And there's different architects now, there's different clients who have different needs. So everything is completely new. Every single time Well, yeah, certain things are gonna be the same, like maybe the way you lay the lay the foundation, or, you know, the, you know, the way you put lumber together is the same. But there's so many unknowns in that, that maybe weren't all considered. Now, if you had like, for instance, a good architect, maybe they've thought through a lot of those announcing it, and you'll have less variance. But maybe, if that architect hadn't really, like, isn't good at translating their stuff into the buildings, or they don't know, the problems a crop when you're

building up, then maybe you don't have that. So there, you can have a lot of different variance. And I think that's what happens again, like, I'm using the building example, because it happens all over the place where people budgets come in over projects come in over budget for buildings, but it happens in IT projects, it happens in personal projects all over the place. Even people who are super professional at estimating can run into these issues, because they are applying the lessons from those narrowly defined projects to these wild, unknown projects.



Francis Wade 14:07


And these are the better cases, because the folks we're talking about here in this moment, are the ones who know that they need to be doing estimating. So they, they the chances are they have some kind of data, they have some notion of the discipline they need to be following. They have some statistical understanding of variance and other factors. So this wouldn't be news to them. In other words, if you were to explain it to them, people who are you know, people who are trained in construction, any degree know these things because they've learned them and they they can also tell you horror stories of when, you know, prior projects they were on that went really really badly. But but it is the bigger challenge that even though even the people who are trained... there is something stronger than their training. Like almost like an instinct. You know, the planning fallacy is the psychological, psychological bias that we have to assume the best will happen when life never cooperates. And evidence shows. And when we collect data, it shows and we all know something's gonna go wrong. It will...Murphy's Law, you know, we have all these anecdotes. But in the heat of the moment, for example, in the story, in the heat of that moment, something overrides our more rational judgment. And we fall into the, the planning fallacy and we create a mess of it. Is it something in human nature that we can't overcome, or that anyone could overcome, because I wanted to have these stories that, you know, planning planners meetings always start late. Half of them arrive at the meeting late because they thought there wouldn't be any traffic ..., that doesn't happen to you in real life, you know, they know these things in theory, and in the right structured environment. And in the right, construction project manager, they will actually follow them. But as soon as there's an opportunity to not follow them, they don't follow them. So half of them will arrive late at the meeting and say "Traffic, you wouldn't believe what happened out there!" Yeah. Yeah. I mean, I care something so strong inside of us that there's no way we should we just end the podcast, because there was no solutions?





Trevor Lohbeer 16:40


I mean, I would say that there's variance in how like, I mean, I'm not a Project Management Professional. So I can't speak to how well they do that in their personal lives, either. I mean, there's certainly disciplines like and, you know, project management is a discipline that helps you learn how to do some of these things better, right, learns how to learn how to plan better. And for those people, like, you know, they can ignore some of that advice, like you said, in their personal lives, they might ignore some of that advice. There's things that they can do to get better from a project management perspective is, like, you know, defining the scope a little bit more upfront to manage the risk curve, right. So a classic thing, and especially if you're doing, again, projects that have like large unknowns, is you try to tackle the largest unknowns first. One of the common mistakes that I would say a lot of that people make is that they do the easy stuff, first that are known, so they can get out of the way to make sure that they have room for


the later stuff. When instead what they should be doing, they should be doing the things that seem impossible at the beginning or that like, have large unknowns, solve those first, and leave all the easy stuff at the end.


 Trevor Lohbeer 18:01
of a psychological bias, right?

 Trevor Lohbeer 18:04
Well, that helps you like manage, like, because then what happens is, if you start with your unknowns at the beginning, then even if you wind up going over your time or over your budget, as you get closer to your launch date, or your final date, where everything's supposed to be done, you have less and less uncertainty there. And so you're more accurate, being able to tell the client or whoever your boss, say, you know, yes, we are going to be able to do it by this date. Whereas if what you do is you leave the unknown toward the end,

 Francis Wade 18:37
You're dead!

 Trevor Lohbeer 18:37
, that's the, that's where you run into the classic problem of the first 90% of the project took, or the first 90% of the time, the second 10% of the project took 90 the other 90% the time. That's a classic, that whole saying comes from the idea of leaving all your unknowns to the end. Now, it's not always possible to leave your unknown, like, do all your unknowns in the beginning because you may want you may not know them, they might be the classic unknown unknowns. They can also be there can also be pressure from your boss or your client to say, hey, I need to be showing the progress I need to do me doing this XY and Z. And that's where the other problem where you spoke about optimism bias, which is you know, we often think things do go better than they actually do. Right as humans. And one of the factors that plays into that is the social dynamics with the person placing demands on onto us. (Like in the story).

 Trevor Lohbeer 19:40
Yeah, when someone places those demands onto us and says like, I need you to do this quickly. There is pressure to reduce your estimations, even if you know it's going to take that amount of time and on the other side is they are ironically often more accepting to "Okay, we have to we have a delay, we ran into problems, we need to extend it", than they are with the original upfront estimate.

 Trevor Lohbeer 19:40

So if you tell someone that it's going to take him three years to build your house, and because you know all the unknowns, and you've worked out the accurate estimate, it's three, three years, they're probably going to go with the person who tells them, it's only going to take one year. And then winds up taking them four years Right? (Yep. Happens all the time.) Just because the way the psychology works. I mean, we're more accepting to say, okay, like, Okay, well, the sunk cost fallacy I've got the sunk costs are just going to go with this, there's an sunk costs can be real things. Like, if I'm trying to build a house, I'm not going to just abandon the house. Like there's some real issues around some of that. So yeah, I think there's lots of pressures that cause us to try to underestimate, but then there's also...



Francis Wade 20:11

In for a penny, in for a pound kind of thinking that, yeah, if as long as I start, then the chances of me being the one to finish it are increased? If I start so let me start.



Trevor Lohbeer 21:06

Yeah, people tend to



Francis Wade 21:08

want to get they want to hear so that at least I start.



Trevor Lohbeer 21:13

Yeah. Or, and that creates this bias that we don't think it's there's not an incentive to think critically about our time, right? Because if I thought critically about my time, and told my client, the actual, like, more accurate estimate, they may not hire me. So and if I do that, and then lowball my estimate, I'm essentially lying to my client, right, which I'm not going to feel good about. But if I don't actually do that, estimate that detailed, and I just, you know,



Francis Wade 21:54

like, you lie,



Trevor Lohbeer 21:58

lying. And then if something it turns out to be longer, okay, you know,



Francis Wade 22:03

at least you're being somewhat true to yourself by being reckless, and loosen slack this makes me think that as as, as far as the disciplines have progressed, and of course, there's lots

of been lots of progress in how we think about estimates, compared to where we were 50 years ago, in spite of it, the psychological and social pressures are ever present. And I suspect that even the best, the most disciplined or the most trained person, you know, when when his or her spouse or his or her children look to them with a certain look, I wonder if that all that training goes out the window, because the psychological and social pressure when it kicks in, it doesn't just change things by 5%. It changes them by 90%. (Yeah,) it's not a, it doesn't strike me as a, it's a moderating influence. This is kind of an all or nothing, you're either in your sane mind, making a logical, professional estimate, or that's all out the window and what they want to hear or what gets you into trouble, or the shortest path to the money or all of these all of these other psychologically appropriate reasons. So it'd be interesting when we get to the solutions, but it's at least explains why we keep making the same error, even though we have more information.



Francis Wade 23:46

I mean, I am guilty of this. I have been collecting data on my time usage for 20 years, maybe more. I have it all backed up. Do I actually use it explicitly? Make estimates. Not really that I don't go back to an organization problem is that to go and track the numbers back would take me so long that when someone calls me and asked me for an estimate by tomorrow, I can't go back and research 20 years old, yada, yada, yada, and figure out which project got which time and so I don't do it. This could just be reality, but I just don't have the time to go through all of that. I use my hunch. I use a hunch. It's informed by some data I have somewhere. But do I go back and look at the data and analyze it before putting my hunch into words? No.



Trevor Lohbeer 24:50

And I would say that, again, like it depends upon what category of project or thing that you're doing, on whether it's valuable How to do that or not like if



Francis Wade 25:01

I wish I could say that you're right, but keep going.



Trevor Lohbeer 25:05

If you're doing the same type of project over and over again, then it is worth tracking that data, analyzing that data, and then coming up with some rules of thumb based upon your analysis on doing for based estimations. But like, again, if you were like, there's some people who specialize for instance, and five page website designs, right, okay, five pages, I know exactly, it's very fixed amount of thing, or anyone who's doing piece work on producing manufacturing thing, if I make shoes, I make dresses, whatever it's like, you know, I should be able to get to the point where I know, per piece, how long it takes me. And then if someone says, you know, I needed to make 100 pieces, you can give me a good estimate, right? Same thing with like website design, or what is with with certain cases of that.



Francis Wade 25:56

I have an example of a case where I have my estimation is, is accurate. In spite of what I just said. I put out a weekly column for a newspaper. it's due on Thursdays, every every two weeks. And I have I have the process for doing so dialed in, at this point. And, as you said, it's repeatable. I have the I collect the ideas randomly through, you know, weeks before, I'd have them stored in a safe place. I go through the list on either Sunday or Monday morning, I pick the topic, I do the first draft, by Monday morning, I second second draft it, third draft it, fourth draft it sent it to my wife for the ultimate approval, she sends me back any corrections or anything that doesn't make any sense. I do a final. And so each that is, like I said, this is 10 years of doing this. Without a break anywhere. I haven't skipped a deadline. I've not missed the deadline yet. But this is 10 times how many times I've done this... 10 years' times. How many times? So that's lots of articles, I think I should have come up with something good.... But it is dialed in. But the unfortunate thing is that it I now have it to the point where I have maybe this is part of the part of the where we could look for solutions. So let's let's let's flip from the problem. And into the solutions. For the second part of our time together.

T

Trevor Lohbeer 27:42

Before we do that, let me break out like different problems while I want to break out the two different problems that this person is facing here. And tie back into what I said before about implicit and explicit time optimism. So this person has two different issues here. One is they're being asked about, can you fit this new project into your schedule, right? And you're and it's a fixed bid project. So I need to figure out, do I want to take this on or not? Like, come soar, like my estimate may not be accurate about it. So there's some sort of some sort of estimation component into this.

T

Trevor Lohbeer 28:21

But the other thing is, my workload is full, right? This client is only half my workload. So now I also have this implicit time optimism too is how long does everything else in my day take? And, you know, how much time am I going to be able to spend on my other client work? You know, and are those clients going to get angry? How much time am I going to be spending on other things like, I'm going to want to hang out with my spouse, perhaps, or maybe I want to, you know, maintain my exercise routine. And then, in a typical, if you have a client based business, while this, I have this client here who's giving me 50% of my business, so that's great. But you also often want to constantly be going out and sourcing new business. So you don't go through feast and famine cycles, very typical problem in a consultancy, is someone gets a bunch of client work, and then they just work on the client work. And they completely forget about trying to get new business into the pipeline. And once all that client work is done, suddenly they have no work and then they're in a famine cycle, you know, and then the compounding in there as the they sometimes aren't billing when they're doing the work because they're so focused on the work they forget to bill and then they get paid too late.

T

Trevor Lohbeer 29:36

So this problem this person has both an estimation problem how do I estimate this task, but they also have an allocation problem? How am I going to allocate my time across my, my other clients, my personal work, and then the other work I need to do for my business, my admin

work and my marketing work, my sales and marketing work.



Francis Wade 29:56

So they bring some optimism to the allocation as well.



Trevor Lohbeer 29:56

they do and they absolutely do,



Francis Wade 29:56

they're going to make magic happen and get can get 175 into 168. Hours per week.



Trevor Lohbeer 30:03

Exactly. So you have time optimism happening on both halves on both the allocation side, and on the estimation side. So I just wanted to introduce that from the problem before we go to the solution, because we might need to address both...it's two different approaches for



Francis Wade 30:21

two different kinds of problems. And I think that in the in the moment, we could easily commit both when under pressure when on the social and psychological pressure, we can commit both of them and is, I think, a kind of fooling ourselves...that goes on. And we're willingly fooling ourselves, because we want to believe that magic. And I want to believe that this is a unicorn project where all of our productivity techniques will come to bear. And we will be amazingly productive. Unlike any other time in our lives ever before. We tell ourselves these things in the moment. Oh, yeah, when I can. And all of a sudden, this hopeful optimism kicks in and starts to ruin both both sides of the equation.



Trevor Lohbeer 31:10

Yeah, well, and I would add, the other thing that happens there, too, is, even if you are an experienced project manager who is really good at estimating time for fixed scope projects, some of the things I just described in the allocation category are open scope, and open scope, the strategies you apply toward open scope, activities, I wouldn't call them projects, because there's no, there's no end necessarily... are different than those you apply to fix scope projects. And so even if you're really good as a project manager on fixed scope, you still may be suffering from time optimism on your open scope stuff.



Francis Wade 31:51

Right. Right. Because, you know, again, that sounds psychological to me, because this is like my vacation. Vacation, I don't need to give a real estimate. So yeah, I throw everything to the wind, you know, this is like, time off. Oh, okay. Sure. Sure. I'll let you know, at some point when we figure it out. When it's going to be, you know, that Michelangelo and the and the Sistine Chapel, when will it be finished? Oh when it's finished? Yeah. Not the moment before? Because operating under a fixed contract is stressful. Or a fixed bid or a fixed situation, but not having that constraint? can feel like, oh, I can relax? . What the heck, yeah. Exactly. As long as you keep the person in the loop, okay.



Francis Wade 32:48

All right. So this is a, this is a knotty problem. If it were only a technical problem, we'd be finished ages ago, and we'd apply an equation that would solve for x. And this will be all done, and we'll be all happy. But it, it seems as if we could talk about discipline, all we want, because that's probably what you know, as the first thing you think of is that you just need to be disciplined. So that when those moments come, you stick to your guns. But I don't think discipline is the right kind of solution. The pressure is too great...in that moment, what do you think?



Trevor Lohbeer 33:29

Um, yeah, I mean, I tend to think that, yeah, in general, discipline, and willpower are not the things you necessarily want to rely on. Like, there's the general idea that with habits you want to rely on your environment with, you know, using default rules can be really powerful on stuff. But yeah, trying to while sometimes it's useful to bring discipline and willpower to the problem. It's better to have fallbacks.



Trevor Lohbeer 34:06


So for instance, there's The Checklist Manifesto, which is saying, Let me have a checklist of all the things I need to do for any procedure to make sure that I'm doing the procedure correctly. Right. One could say is, well, why don't you just have the discipline to like do that or you memorize or whatnot. Now, I still have that discipline, I just have to have the discipline to then use the checklist. So I've reduced the amount of discipline I use. So in in cases like this, where I need to make a decision, having a decision framework, having an estimation framework that I can rely on, I still have to have the discipline to use those frameworks. But then I can rely on the discipline, I can rely on those frameworks as my backstop. So if I go through an estimation framework, and I say, Hey, this is going to take 500 hours, you know, or 300 hours or whatnot to my client. And my client goes that much like, I thought it was gonna take only 50 hours. And you can go well, you know? No, I've done the analysis. Right? So it creates this way to support you being disciplined in holding your ground creating your boundaries, that sort of things. Okay.





Francis Wade 35:26


So, in essence, following your checklist for doing estimates, helps you win the psychological and social battle when your client or the other person to whom you're giving the estimate


and social battle when your client or the other person to whom you're giving the estimate, queries it, is it correct? Yeah. So you follow your process, and you trust it, you at least have some possible extra conviction. So following the checklist, added to your conviction,

 Trevor Lohbeer 35:58
yes, adds your conviction

 Francis Wade 36:00
I'm going to ring our bell, and , following our process or predefined process, builds, builds conviction. Yeah.

 36:15
And creating structures, like you talked about before being late to a meeting, because you didn't account for traffic, right. And the other thing that we don't account for is the amount of time from when we decide to leave the house to while we're actually driving away in the car, or, you know, getting on the subway, and the amount of time that it takes to get from there to actually sitting in that room for the meeting, right? parking the car, or whatever. And I call that over this framework called the Prep Do Wrap framework. And the idea is you always have Prep time and Wrap time for any activity. And we don't consider that. Well, if up. Yeah. So if instead what you do is you go, okay, every activity is going to have a Prep Do Wrap phase, I have this framework, and I can apply that and go okay, it's going to take me 15 minutes to drive there. Well, now I also need to apply, but all I have to do is apply the framework. And the framework already then says, well, then how much time are you prepping for how much time is wrapping so then I go, okay, 15 minutes to drive there. It's going to take me about five minutes to get out of the house five minutes apart and get in the building. So now my 25 minutes. So that might be one framework. And now I might start to account for traffic. And so then maybe my framework for that is to every time before I leave the house, check Google, and then 10 minutes. So what Google says right, and the best 10 minutes. Yeah, exactly. And so now we've developed a process by which we can ensure that we're at meetings on time.

 Francis Wade 37:54
And this is not just the meetings, obviously. But yes, yeah, absolutely not. Yeah, do you recommend that you apply it to high stakes, appointments, like meetings? First before the others.

 Trevor Lohbeer 38:06
Um, I mean, I applied to almost every meeting I have is I have like, whether I'm driving or not like I always have a Prep, Do Wrap phase, I think that's critical for almost everything we do. It's useful to come into a meeting prepared. And it's useful after the meeting to take notes, figure out what your next action items are, maybe immediately do your follow ups directly from the

meeting. But there's almost always some wrap up after the meeting as well. Doing for conferences, a lot of people don't book a conference on their calendar, but they won't book the time before the conference to prepare for the conference to see who they want might want to meet what are going to be the key things. They're not allocating enough time for that. And they don't book enough time afterwards. for follow up for networking for taking notes and reviewing the notes. Knowledge that you gained from a conference and connections that you make from a conference are only valuable, if you then follow up on that if you review the that knowledge if you reach out to those people afterwards. And you want to build those relationships. So recognizing that everything has this Prep phase and a Wrap phase. And then allocating time for it helps you in the grander scheme, be less of a time optimist when you're going to meetings, going to conferences, all that sort of thing.



Francis Wade 39:32

I doubt that anyone listening listening would argue with Prep Do Wrap. I think the problem is the routine, the regular routine application of it to because you could you could apply to every single task. . But I imagine that you're saying Prep Do Wrap is particularly valuable in cases like meetings or unknown tasks, where there's a and higher degree of variability, it is useful in more useful than even,



Trevor Lohbeer 40:10

I would say. So I haven't thought about when it would be useful to eliminate let me try to riff on when it potentially might be useful, I would say it is useful in situations where the activity you do or doing has future implications. Yeah, on one is, is your preparation going into the activity affects the performance of the activity itself. And then your ability to review or in some way, wrap up that has implications for the future. So if you are doing something that is an isolated task, that, like for instance, you don't have to Prep and Wrap to empty the dishwasher, right? You empty the dishwasher, when the dishwasher is empty, it's done.



Trevor Lohbeer 40:58

That does depend on your home situation, but I get the point.



Trevor Lohbeer 41:02

In general, you don't have to Prep and Wrap to empty the dishwasher, if the tasks are going to be completed in the time you're doing it. And then once the test is done, there's no reason to review it any more than, you know, like, um, filing your taxes could kind of fall into that you might want to do some prep work for your taxes. But like, once you file your taxes, you know, you file them in that drawer and you know, there's probably little wrap up, you don't need to go review it like you know, and a week later, and oh, did I do the my taxes, right? Or whatever. However, say you're doing a project, and you're working on a project site and say you're writing a book, and you're writing a chapter and what your your idea is to write 1000 words a day, it can be helpful to have a Prep and Wrap phase in there. In the Prep phase, what you're doing is you are loading what you did in previous days into your brain and figuring out what you want to

spend your time on, then you start writing. In the Wrap phase, what you want to do is you want to record where you are in that process, get down all your thoughts about what to do the next day. So that way, what you're doing is you're linking each of those together, each time you sit down to write, you're linking it, you're taking the link from the past and then linking it to the future at the end. And so that Prep Do Wrap phase creates this, this link that helps you build momentum through that. Whereas say, yesterday, you didn't do any Wrap, like you're writing and then there was an emergency, you had to just drop everything right, right. When you come in the next day, it's gonna take you a lot longer to get started. Because you don't know where you're at. You didn't take any notes, you didn't write down anything, you just, it just stopped. And so now you need to like go back, figure out where you're at, start building momentum. And so your efficiency that day, and your momentum that day is a lot lower than if you have a Prep and a Wrap.



Francis Wade 43:00

That sounds like it's it's the future is about dependency.



Trevor Lohbeer 43:05

Yes, you could say it's about dependencies. If there's a dependency, if if what I'm doing has a dependency on the future, then I should try to have a Wrap Phase on that because



Francis Wade 43:15

of that ripple effect that I mentioned at the very beginning, that if you get the first part wrong, and not correct it, you'll get the second part wrong. Third part wrong, and then it'll all be downhill from there.



Trevor Lohbeer 43:28

Yeah, well, there's two things, there's ripple effects, and then there's momentum. So you can think of it as speed and direction. If you're if your direction is off, even by a few degrees. So you're, you're boating and your directions off by a few degrees, you know, a little bit later, you're only to fall a little bit apart. But if you let that keep going, you just drift farther and farther apart. So even small variances in how off alignment you are, can cause huge variances over time. And then the second thing is the speed component, which I mentioned, which is like, you know, are you starting stopping, starting, stopping, starting stopping? Or are you moving at a constant speed or even accelerating because you're building on what you're doing each day? So there's really two different ways to think about it. But both of them relate to how do I move from this spot to this spot.



Francis Wade 44:19

Just to see where we started along this thread? Prep Do Wrap helps you deal with dependent dependent sequences of tasks or in other words, processes that extend into the future. And if you don't do your Prep Do Wrap, be prepared to pay for it in terms of speed and momentum

you don't do your Prep Do wrap, be prepared to pay for it in terms of speed and momentum. Yes. Okay. All right. That's a good that's a that's, that's. Yep. All right. That's, that's the one. That's one Okay.



Francis Wade 44:29

Second one I asked was How about the variability. Do you do Prep Do Wrap when you get that this is a novel kind of situation? You have limited data to go with, you have very little experience. Do you spend more time prepping and more time wrapping up? And do you build that time in? I don't I like to rush off to the next thing as soon as something is even if it smells like it's finished. Yeah, you know, I have that whatever profile that is a Myers Briggs - I'm a J - and once things start to smell finished, I'm on to the next one. I'm thinking of what I'm doing next. I'm done. I've already done my body's mind already gone.



Trevor Lohbeer 45:43

Even if it's not actually done



Francis Wade 45:45

yet, especially when finishing it up is like the boring part. And wrapping up is like, kill me first. I'd rather go seek the thrill of the next thing rather than wrap anything up.



Trevor Lohbeer 45:56

You're like a novelty seeker.



Francis Wade 45:58

My default way. Yes. Confessions. Yeah. So Prep Do Wrap would be particularly important for me in those cases where I'm about to tackle a project where I don't know how long it's going to take. This is what I'm gathering?



Trevor Lohbeer 46:18

Yes, well, so and so this goes back into the project management side. And let's go in and talk real briefly about the two different things that I talked about. Open scope versus fixed scope. So like, if I have a project, and I'm doing fixed scope? It does, I believe it does. And again, qualification is I'm not a professional project manager. So they have a whole bunch of tools that their tool set that are much more effective than I'm going to be able to present. But in my conception, is that what you want to do at the beginning, is try to identify your potential unknowns as much as possible, or at least the areas where those unknowns may hide. So you

want to avoid, you know, opening a box and it being a can of worms. And now suddenly, you're deep within the decision. That's not always possible, but to the degree that you can think that through that is useful. I am a big fan of ...explicitly. Yeah. Right?



Francis Wade 47:26

Because there's a intuitive way to do what you said, the problem is that you may not do all of it, you may not, remember, sometimes, you may decide this time, I want to wing it. For various reasons, you might want to skip that.



Trevor Lohbeer 47:43

Well. And I think it's also important, particularly for unknowns to write down everything that you think you know, and then take a step back and come back to it and say, what are the gaps? Or there's another example what is, oh, I'm going to forget his name is a Feynman? or a method for learning things. And to really know that you know, it is to write down everything you know about a topic, and then try to explain it to someone who knows nothing about that topic, or try to explain it to like, like a six year old, right? Or to that. Yeah. And then every time someone asks you a question you can't answer, write that down, then go research those answers. Try again. And until you can have a very simplified example that you can teach to someone, you haven't truly learned it.



Trevor Lohbeer 48:38

But you can use a similar process for project planning is where you write down everything you think you know about the project, right? And how you think it's going to play out. And then you go and you explain that to someone else. And then they're going to ask you like a particularly like another project manager, someone who has that mentality, ask your questions, and then they're going to uncover unknowns that you didn't think about.



Trevor Lohbeer 49:04


Or there's the pre mortem strategy, right, which is where I go six months in the future, or whatever and say, the project failed, why did it fail, and then you work backwards to find out why it failed. And then that uncovers the unknowns. So there's lots of different strategies for uncovering those unknowns. But taking the time to uncover the unknowns, especially for important projects... for unimportant projects, not so much. But for important projects. Taking the time up front to uncover where the unknowns might be, is really useful, because that lets you then start figuring out how to even approach estimating time.



Francis Wade 49:46

It triggers your decision to use Prep Do Wrap because I won't do Prep Do Wrap for when I'm brushing my teeth because there's some dependency on going to the dentist, but it's not immediate dependency. And also, there's a whole lot of knowns. I can't think of an unknown,


that happens when I brush my teeth. So in that case, I would I wouldn't use, it wouldn't trigger the use of Prep Do Wrap, but the opposite extreme where either of those two are present. And the number of unknowns is high. How do you how do you? How do you know the number of unknowns is high? Before you actually make that list, because you can't make a list for everything and say, Okay, I'm gonna comb my hair, how many other unknowns and combing my hair? Well, you'll die by paralysis. If you try to apply this to everything.

 Trevor Lohbeer 50:52


So I've got one shortcut. This isn't like totally accurate. But my way of looking at, let me take a step back. So I believe effective project management, project management more effective when you use multi point estimates instead of single point estimates. And what I mean by that, is that what most people do, is they say this task, this sub task of my project is going to take two hours or four hours, they give a specific a single estimate, right? It is better, in my opinion, to say best case / worst case. You can even do what's called Three point (a distribution), which is best case. Worst case. Expected case,

 Francis Wade 51:40


right? normal normal curve,

 Trevor Lohbeer 51:43


if you get there's a there's a great project management software called LiquidPlanner. That actually, lets you have a whole series of tasks with dependencies, all with multi point estimates, and then will tell you, this is your 95%, probable finished dates 98% 99% probable finish dates based upon combining all those probabilities.

 Francis Wade 52:04

We needed those on a daily basis, like your fingertips.


 Trevor Lohbeer 52:07

Yeah. But then then that the question becomes is, how do you figure out like, what your best case worst case should be? Right. And what I am a big fan of is creating categories of tasks that tell you in general, how risky those tasks are. So I just pulled up an old article I wrote about this. And here, in this case, I have seven different categories that I would classify a task under. So going and starting at the least risky is routine tasks, things I do regularly, they have a fixed endpoint, few unknowns, low variance, exercise, taking a shower, all those things,

 Trevor Lohbeer 52:55

then we have chores, which are just a one off task. They usually have a fixed endpoint, few


unknowns, low to medium variance. So the example there is buying a new shirt or calling to cancel a service, probably not gonna have too much variance.

 Trevor Lohbeer 53:10


Then you have remixing where I take an existing creation, and I reconfigure it. So like editing a document, improving a business practice updating marketing campaign, right?

 Francis Wade 53:21


The scope was the same, but the contents are reordered in some way

 Trevor Lohbeer 53:25

Yeah, reorganize...the scope may not be completely fixed, as I may not know exactly when I'm done, maybe I'm gonna have a gut feel for when I'm done. So maybe I timebox that a little bit and say, I'm only going to spend an hour editing this document. So I can create a time based scope if I want to, but they tend to have low to medium variance, unless you get into this perfectionist spiral, some people get into perfectionist spiral where they then just keep going down the rabbit hole of spending hours and hours trying to get something absolutely perfect. There's a whole nother strategy for that. But then that can create variance, but in general, re mixing tend not to have a variance.

 Trevor Lohbeer 54:01

Research things. This is where I'm trying to gather information about a topic, often that has no fixed endpoint. And the problem is that new avenues are going to open up and that bring you down unexpected paths. So I tend to have a lot of variances like if you're going to research on this stereo or whatever, like research on which software you need to buy for your business. You're going to do some initial research, and then maybe a new option pops up that causes you to reevaluate everything. So there's ways to look at it is like point of no return. Am I hitting a point where like new information isn't actually causing me to change my decision in any way? There's strategies around that. But it's going to from before you actually go into a research thing and you're trying to estimate it, you need to realize that that is going to have medium to high variances. You might think it's going to take an hour but could easily take 5-10 hours to research. So there's a lot of variance

 Trevor Lohbeer 54:58

Implementation... that's where you Have a plan already made, and you need to make it happen. So that's gonna have a fixed endpoint. But there's often some surprises along the way, again, if you got the blueprints for the house, but when the lumber comes, maybe the lumber is warped. And you have to deal with that. So, so there's going to be some medium variance there.



Trevor Lohbeer 55:16

We've got creation, where I'm developing something new. But it's similar to something someone else has done in the past.



Francis Wade 55:22

So it's a bit of a mimicry.



Trevor Lohbeer 55:26

Yeah, like, I'm gonna write a book, okay, people have written books in the past, I can read advice on how to write a book, you know, or I'm going to build a software product or whatever. The specifics might be different, but the general process has been the same. But that's gonna have medium to high variance.



Trevor Lohbeer 55:42

And then the one that has extremely high variance is invention. And that's where I'm going to create something new that no one has ever done before. Right? Like, I'm going to cure cancer, or I'm going to like whatever, right, I'm going to do something that no one has ever done before. There's no roadmap for that. There's no endpoint for that there's, or there might be an endpoint. But there's like, the the way you approach that kind of task is completely different than the others, because there's so many unknowns, and because it's so high variance.



Trevor Lohbeer 56:11


So what I do is I first say like, what type of task and people can come up with their own categories, but having categories and like, what type of task is this, this tells me the variance. And there's the old standard project manager multipliers, you take whatever someone, as time has spent, someone gives you a multiply by three. And that's what I give to my client, right. And, like, that's a good, that's a good rough rule of thumb, right. But I think it is also useful to look and say, if you want to get more specific, is to say, have different rules of thumbs for each of these categories.



Trevor Lohbeer 56:49

So again, for routine tasks, I might just multiplied by one. But once I get into like re mixing, where I'm editing something, okay, maybe I multiply by that, by two, there might be some problems, but there tends not to be, you know, whatever, when I get into, like, creation ation, or I'm gonna multiply that by five, and maybe invention, or multiply by 10, or 20. Right. So I'm going to not just apply a blanket rule of thumb, I'm going to look at what what type of tasks this project involves, and then using different rules of thumb for those different types. Going back to our example, the very beginning, where, like, part of the setup for this episode is that a


client is coming in asked us to work on a new project, with a new technology no one's ever done before. Okay, I need to use a higher multiplier for that. Then if someone is coming in, ask me do a project I do all the time, different types of multipliers for different types of projects.

 Trevor Lohbeer 57:50

So there is no blanket rule, but like having just some sort of sense of that, and then where you can use that multiplier is? Well, I do that multiplier. Someone tells me two hours I might multiplier of four I can say okay, it's going to be from two say I have a multiplier of, say a multiplier of five. So they give me an estimate of two... is two to 10 hours. So I use whatever they give me as the worst case, but you can also say like, okay, like, well, they give me an estimate of two multipliers, five some or semi multipliers for today hours. So I could say it's going to be anywhere from a half an hour to eight hours. However, you kind of want to do it. So I could divide, I could take the point estimate, and say the estimate they gave me is the middle one, and then use my multiplier to calculate you, or what I do, because it's simpler to say the estimate they gave me as the worst case, and I multiplied at the height, the best case.

 Francis Wade 58:48


So you start with their estimate?

 Trevor Lohbeer 58:52

Yes, I started with all kinds of trouble. Well, you have to start somewhere. Right?

 Francis Wade 58:57

You have to start somewhere. Yeah. Well, it strikes me that we were we'd have to wrap up at this point, because we're almost we're just about at the end of the hour...is your investment in coming up with these multipliers has made all the difference. When someone approaches you, you've invested the time to say this is important for me. And the chances of you forgetting that you came up with these multipliers because of social and psychological pressure is far lesser or far lower. Yeah, because you're the actual one puts it in place. So if I had my druthers, I guess I would put everyone through multiplier by category development workshop. Yeah. And have it be your preparation for when someone comes to you. And they put you in the heat of the moment. And there you have to pick one time three times, five times or 10 times. And in in the flash of a moment you say, sounds like a three. And you give an answer. So at least you have a, it's almost like a pre rehearsed heuristic

 Trevor Lohbeer 1:00:24

It helps you to at least pause and think, because now you can start thinking in terms of these categories. So you can say, is this something that requires invention creation? Remixing? Or is it something I do all the time? And, and just being able to like, kind of look at that? Or saying, like, what percentage of this project isn't mentioned? What percentage of the project, even if

you're not going down to the individual test level, someone gives you a project? And what's my gut feel for? How much invention? How much is creation? How much is re mixing. And then I can use that to kind of just gut feel my stuff. But now I'm at least recognizing the characteristics that make one project different from another project. That might mean my task estimations, or again, at the beginning episode, we said the past does not always predict the future. So why does it not? And one of the reasons it is not is because the mix of these different types of tasks, different projects, a project is different. And so my number of unknowns is different.



Francis Wade 1:01:20

I really liked this, it gives you it gives you a practical step to do to perform right in that moment. And you can be very clear about the cost if you decide not to do it. It's something you could practice doing. Because in a workshop setting, you could throw people different projects, theoretical projects, and say, Alright, what's your blend for this project? What's your blend for that project? What's your blend for this one? You're under pressure here, the roleplay? What's your answer? And actually start to give the person some practice in. So when the time comes, and they're actually on the court, and the ball and the ball is being served to them. metaphorical ball has been served to them. They don't just freeze. Yeah, they go back to Trevor's advice, speaking about advice Trevor, where can people get more? More of your insights, and wisdom and spend some time with you?



Trevor Lohbeer 1:02:11

Yeah, so people can find me at Dayoptimizer.com, which is a time management web app for solopreneurs to help them better plan their day. And that is a lot more focused on the part of the episode. We didn't talk in this episode, which is how do I allocate my time, and take the amount of time in my day and figure out how much time we're going to spend on my multiple competing priorities?



Trevor Lohbeer 1:02:32

I think that's the next. That's our next call. (Yeah, that's a whole separate episode.) We did estimation in this one, we will do allocation in the next one.



Trevor Lohbeer 1:02:40

Exactly. So yeah, that's the best place for them to find me. I also have a website called strategic life tools where people can find... it's now free, you just free to join, and you get different tools for building life plans. And then again, lean decisions, where I'm applying the same sort of stuff that we talked today about creating different categories of decisions, so you know which type of decision you're making, so you can figure out what is the best way to make that type of decision.



Francis Wade 1:03:08



Francis Wade 1:03:00

Fantastic. Trevor Lohrbeer thanks for joining me here on the Task Management and Time Blocking Podcast. As always, if you've already booked the time for you to come back, so until we hear from you later. Yes, thank you so much. Great. So guys, keep listening. There's a little bit more coming up after the music that's coming up and we'll wrap up this episode and keep listening.