



Emily's PKM Struggle

Always Searching for the Perfect System

- 32-year-old marketer obsessed with finding the "perfect" system
- Started with Tiago Forte's Second Brain method 3 years ago
- Switched to Notion after 2 months ("It has databases!")
- Recently moved to Obsidian, spent days on themes and plugins
- Spends more time tweaking systems than creating content
- Has 200+ unprocessed articles saved "for later"
- Takes meeting notes on phone but rarely transfers them
- Watches tutorials instead of developing her own ideas
- Half-finished notes abandoned for not being "perfect enough"
- Last night's dilemma: customize templates or actually write notes?

Emily - Individual Space Characteristics

Emily (Doing Space)

- Frequently switches between note-taking applications
- Spends excessive time learning new tools rather than creating content
- Continuously changes conventions and workflows
- Adds plugins and modifications constantly
- Collects internet summaries rather than writing personal notes
- Exhibits perfectionism causing frequent rewrites or abandonment
- Experiences long periods of inactivity between intense system changes
- Returns to applications only to restart the modification cycle

Emily Know How (Skills Space)

- Technical proficiency with multiple PKM applications
- Expertise in software customization and plugin implementation
- Detailed knowledge of various PKM methodologies
- Strong ability to evaluate and compare different systems
- Weak consistent implementation of any single system
- Limited experience with sustained note-taking practice
- Underdeveloped linking and connection-making between ideas
- Poor balance between system maintenance and actual knowledge work

Emily Beliefs and Values (Knowing Space)

- "The perfect system is just around the corner"
- "I need the right tool before I can be productive"
- "Others seem to have figured this out, but I'm struggling"
- "Perfection is necessary before sharing/building on ideas"
- "Technical mastery is a prerequisite to effective note-taking"
- "My notes aren't good enough yet"
- "My personal knowledge management isn't working because I haven't found the right approach"
- "If I just had the optimal setup, my productivity would skyrocket"

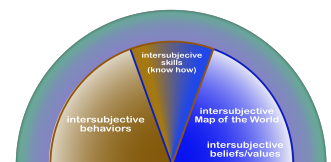


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The Geek Identification

Geek: Intersubjective Behaviors

- Constantly researches the latest tech innovations and applications
- Spends significant time configuring devices and software
- Customizes user interfaces extensively
- Prioritizes technical specifications over practical usage
- Follows tech news and communities religiously
- Early adopter of new technologies and software
- Collects apps and digital tools, often unused
- Takes pride in knowing technical details others don't understand



Geek

Geek: Intersubjective Know How

- Deep knowledge of technical specifications and comparisons
- Expertise in system customization and configuration
- Ability to troubleshoot complex technical issues
- Familiarity with technical jargon and concepts
- Skill in researching and evaluating new technologies
- Mastery of keyboard shortcuts and efficiency techniques
- Understanding of software architecture and integration

Geek: Intersubjective Beliefs

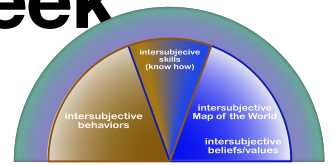
- "Newer technology is inherently better technology"
- "The solution to tech problems is more or better tech"
- "Customization and optimization are inherently valuable"
- "Technical sophistication reflects intelligence and expertise"
- Values cutting-edge innovation and technical elegance
- Believes mastering complex systems is intrinsically rewarding
- Sees technology as both identity and lifestyle
- Trusts technical solutions over analog alternatives
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Comparison Emily - Geek

The Geek Identification



Geek

Behavior Alignment

- **Geek:** Constantly researches latest tech ↔ **Emily:** Continuously researches new PKM tools
- **Geek:** Extensive time configuring ↔ **Emily:** 3 evenings perfecting Obsidian themes
- **Geek:** Customizes interfaces ↔ **Emily:** Tweaks templates and CSS in Obsidian
- **Geek:** Collects unused apps ↔ **Emily:** Seven different note-taking systems
- **Geek:** Prioritizes specs over usage ↔ **Emily:** Focuses on features over content creation
- **Geek:** Early adopter ↔ **Emily:** Quickly jumps to new PKM systems

Worldview Alignment

- **Geek:** "Newer is better" ↔ **Emily:** Each new system is "the one"
- **Geek:** "Solution is more tech" ↔ **Emily:** "I just need to find the perfect workflow"
- **Geek:** "Customization is valuable" ↔ **Emily:** Spends more time formatting than writing
- **Geek:** "Technical mastery = expertise" ↔ **Emily:** Watches advanced tutorials instead of practicing

Know-how Alignment

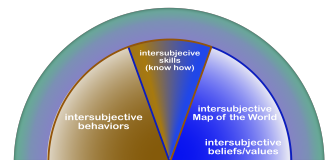
- **Geek:** Deep technical knowledge ↔ **Emily:** Extensive knowledge of PKM methodologies
- **Geek:** Configuration expertise ↔ **Emily:** Plugin installation and customization skills
- **Geek:** Technical jargon fluency ↔ **Emily:** Fluent in PKM terminology ("backlinks," "PARA")
- **Geek:** Research skills ↔ **Emily:** Constantly researching new PKM approaches



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Case Study: Application of the Experience Matrix to PKM Transition

The Gardener Identification



Gardener

Bottom up

Creativity

Gardener: Intersubjective Behaviors

- Captures ideas prolifically without immediate organization
- Follows curiosity trails without predetermined destinations
- Adds notes to their system without immediate categorization
- Creates connections between ideas spontaneously
- Works in messy, stimulating environments with multiple inputs
- Starts many projects based on momentary inspiration
- Revisits old notes randomly to discover new connections
- Resists rigid scheduling and planning

Gardener: Intersubjective Know How

- Rapid ideation and association-making
- Divergent thinking across disciplinary boundaries
- Comfort with ambiguity and unfinished work
- Ability to detect patterns in seemingly unrelated material
- Creation of rich, multimedia note collections
- Skill in following inspiration wherever it leads
- Capturing insights in the moment they arrive
- Building flexible, adaptable systems that grow organically

Gardener: Intersubjective Beliefs

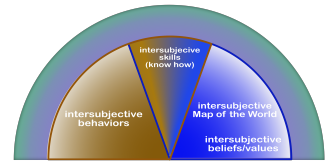
- "The best ideas emerge **organically** from exploration"
- "Premature organization stifles creativity"
- "Serendipity is the most valuable source of insight"
- "Systems should evolve naturally, not be imposed"
- Values surprise, discovery, and the joy of unexpected connections
- Believes that constraints often limit potential breakthroughs
- Sees knowledge as an interconnected web rather than a hierarchy
- Trusts the process of emergence over deliberate design



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Case Study: Application of the Experience Matrix to PKM Transition

The Architect Identification



Architect

Top Down

Structure

Architect: Intersubjective Behaviors

- Creates structure and categories before adding content
- Plans work sessions with specific objectives
- Regularly reviews and reorganizes existing notes
- Maintains consistent naming conventions and metadata
- Works in clean, organized environments with minimal distractions
- Completes projects methodically before starting new ones
- Schedules regular maintenance of their knowledge system
- Follows established workflows consistently

Architect: Intersubjective Know How

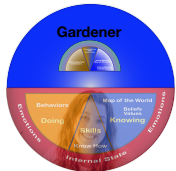
- Development of comprehensive taxonomies and classification systems
- Creation of interconnected maps of content
- Systematic information processing workflows
- Advanced metadata and linking strategies
- Methodical project planning and execution
- Creation of templates and standardized formats
- Integration of new information into existing structures

Architect: Intersubjective Beliefs

- "Well-organized knowledge is more valuable and useful"
- "Clear structures lead to clearer thinking"
- "Efficiency comes from systematic approaches"
- "Investment in organization pays dividends later"
- Values clarity, order, and logical progression
- Believes that disciplined systems produce reliable results
- Sees knowledge as a carefully constructed edifice
- Trusts deliberate design over emergent patterns



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Contrast Framework Behaviors: Emily-Gardener

Emily (Doing Space)

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From Current Individual Space to Gardener Identification: Behavior Shifts

- **Current:** Constantly switching applications → **Target:** Choose one tool and embrace its limitations
- **Current:** Excessive time on technical setup → **Target:** Focus on capture without concern for form
- **Current:** Changing conventions frequently → **Target:** Allow organic patterns to emerge
- **Current:** Perfectionism and abandonment → **Target:** Embrace imperfection and messy exploration
- **Current:** Long inactive periods → **Target:** Create regular but unstructured interaction with notes
- **Current:** Collecting internet summaries → **Target:** Write personal, associative reflections



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Contrast Framework Belief: Emily-Gardener

Emily Beliefs and Values (Knowing Space)

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- "I need the right tool before I can be productive"
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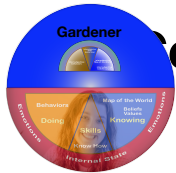
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From Emily to Gardener: Belief Transformations

- **Current:** "The perfect system exists" → **Target:** "Value emerges from use, not system design"
- **Current:** "Need the right tool first" → **Target:** "Any tool can work if used consistently"
- **Current:** "Perfection before sharing" → **Target:** "Imperfect ideas can be the most generative"
- **Current:** "I haven't found the right approach" → **Target:** "The approach emerges through practice"
- **Current:** "Technical mastery is prerequisite" → **Target:** "Content creation precedes system refinement"



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From Emily to Gardener: Know How Transformations

Current: Technical proficiency across tools → **Target:** Capacity for rapid, unfiltered idea capture

Current: Expertise in customization → **Target:** Comfort with ambiguity and messiness

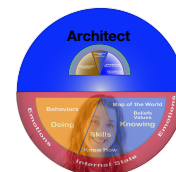
Current: Knowledge of methodologies → **Target:** Skill in association and connection-making

Current: Evaluation of systems → **Target:** Trust in organic knowledge development



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Contrast Framework Behaviors: Emily-Architect



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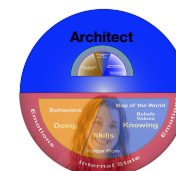
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- **Current:** Constantly switching applications → **Target:** Commit to one system for at least 6 months
- **Current:** Changing conventions → **Target:** Establish fixed conventions and stick to them
- **Current:** Perfectionism causing abandonment → **Target:** Define "good enough" criteria beforehand
- **Current:** Long inactive periods → **Target:** Schedule regular, structured note-taking sessions
- **Current:** Restart cycle when returning → **Target:** Resume where left off without system changes



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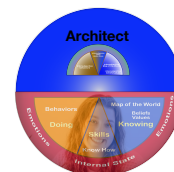
From Emily to Architect: Belief Transformations

- Current:** "Perfect system around the corner" → **Target:** "Consistency with an imperfect system outperforms perfect system-hopping"
- Current:** "Need the right tool" → **Target:** "Disciplined process matters more than tool selection"
- Current:** "Others have figured it out »" → **Target:** "Structured experimentation leads to personal mastery"
- Current:** "If I had optimal setup... »" → **Target:** "Systematic execution with basic tools beats advanced tools with sporadic use »"



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From Emily to Architect: Know How Transformations

Current: Technical proficiency across tools → **Target:** Deep mastery of one integrated system

Current: Detailed methodology knowledge → **Target:** Consistent implementation of one methodology

Current: Evaluation skills → **Target:** Project planning and follow-through

Current: Poor balance → **Target:** Systematic maintenance scheduling



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Transition to Architect Identification

Immediate Actions

- Select one PKM application and delete all others
- Define a fixed metadata schema and folder structure
- Create a workflow diagram for all note types
- Establish a 90-day "system freeze" with no modifications allowed

Practice Development

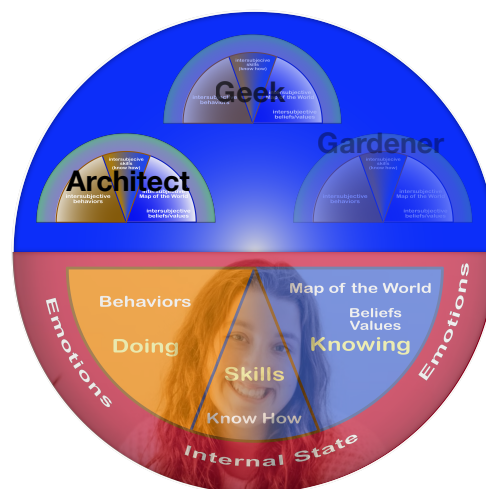
- Schedule three 30-minute note-taking sessions weekly
- Create templates for different types of content
- Implement a weekly review process
- Develop a progressive classification system

Belief Reinforcement

- Track completion rates before and after implementing structure
- Document benefits of consistency over time
- Study examples of systematic knowledge management success
- Create visual progress indicators for system adherence

Milestone Goals

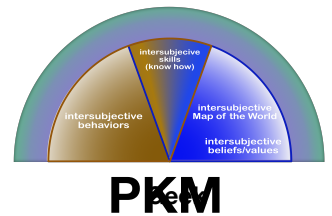
- Complete 90 days without changing systems
- Develop and implement 5 standard templates
- Create a master index of all notes
- Successfully complete a knowledge project from planning to execution



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Transition Analysis

Emily's current behavior patterns strongly align with the Geek identification
Focus on tools, features, and configuration rather than content creation and knowledge
Emily has transferred her Geek identification patterns into the PKM domain.



Key Insights

1. Emily's PKM struggles are not unique to note-taking—they reflect a broader pattern of **prioritizing technical sophistication over practical application**
2. Her tool-switching behavior likely predates her interest in PKM
3. The excitement she feels when discovering new systems is linked to her Geek identification's reward system
4. Her perfectionism about systems reflects the Geek value of technical mastery as status

Transition Leverage Points

To help Emily move toward either Gardener or Architect identifications, interventions should acknowledge her Geek tendencies while redirecting them:

1. **For Architect transition:** Channel her technical precision into system design, but with strict boundaries (one tool, fixed period)
2. **For Gardener transition:** Leverage her enthusiasm for exploration, but redirect from tools to ideas
3. **For either path:** Help her recognize when Geek identification is activating and create conscious choice points

Practical Implementation

- Create a "Geek satisfaction budget" (limited time for technical optimization)
- Develop a "Feature freeze pledge" (X months with no new plugins or tools)
- Harness technical interest by focusing on content automation rather than system aesthetics
- Reframe "mastery" from technical sophistication to consistent practice



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Practical Implementation Strategies: Emily>Architect

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Personalized Recommendation for Emily

Based on her individual's profile, the **Architect Identification** may provide the most beneficial initial transition.

Her **perfectionism and tendency toward technical optimization would be channeled into creating a robust, well-planned system**, while the discipline of the Architect approach would counteract their habit of abandoning systems.

The structure and limits of the Architect approach would provide necessary **guardrails** against their tendency to constantly modify and restart.

Once she will have **experienced the benefits of consistency** within a structured approach, she might later explore the Gardener identification as a complementary mode, but the immediate need appears to be establishing sustainable practice through structure and commitment.

Key Message for Emily

The perfect system will never arrive.

Choose a system—any system—and commit to it long enough to develop actual content and practice.

Your current approach optimizes for system design rather than knowledge development.

Remember that the world's greatest thinkers created valuable work using index cards or simple notebooks.

The value is in the ideas and their connections, not in the technical sophistication of the tools that contain them.



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Conclusion

Master your mind, not just your PKM app/methodology

PKM success goes beyond methodologies and tools

What happens in our minds is paramount

Without addressing internal patterns:

- We risk endless tool-switching
- We collect courses without implementation
- We optimize systems that remain empty

The Experience Matrix reveals these deeper dynamics

Today's session was just an introduction to this powerful model



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Conclusion

Master your mind, not just your PKM app/methodology

Interested in mastering the Experience Matrix?

For self-understanding or coaching applications

Online training program coming soon



Sign up for newsletter:

Paper forms available at the back desk

Scan QR code on screen

<https://skillmodeling.com/home/experience-matrix-model/>

You are welcome throughout the summit:

Questions about your situation

Discuss applications to your practice

Connect about collaboration opportunities