My 40-Year Digital Knowledge Journey

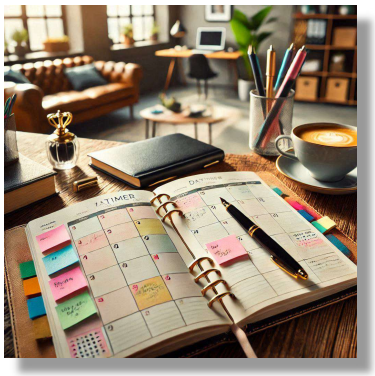
December 17, 2024

Technologies, Methodologies & Tinkering

My journey with what is now known as personal knowledge management (PKM) began on paper but gradually moved to an IBM PS/2 Model 30 personal computer (PC) running Windows 3.1 on a 20 MB hard drive. At work, we were still distributing paper memos or hardcopy correspondence using interoffice mailers but had also just started using the first Microsoft e-mail program, Microsoft Mail. The year was 1988. Blockbuster had only recently opened its first store in Texas. I was buying software at a brick-and-mortar store known as Egghead Software.

As a young manager, I depended entirely on my paper-bound Day-Timer planner. I carried this planner to meetings, my office, home in the evening, literally everywhere. I maintained a complimentary paper filing system for documents stored at work and home to supplement my Day-Timer. My paper-based system worked, but I began storing my professional and personal work on two IBM PS/2 computers, one for home and one for work. File transfer between the two was accomplished using 3.5-inch diskettes.

Increasingly, I began moving my paper-based information into this new digital technology, with no idea it would eventually replace my beloved Day-Timer. My hardcopy "data" from 1988 --- which I retain to this day --- would become part of a digital knowledge base (KB) that I use today for my personal and professional life. Although I still maintain remnants of a paper-based system --- primarily a Moleskine personal journal --- all this material has been migrated into a digital format. My PKM journey has involved continuous tinkering with new technologies, methodologies, and architectures, which I use to mine information and knowledge digitally.



Journey Background

First, a little background. PKM traditionally has been an approach to managing information that individuals accumulate and use. Over the years, PKM has been known by many terms, reflecting its evolving nature and scope. Initially, it was often referred to as "personal information management" (PIM), focusing on organizing digital files and emails. As technology advanced, the concept expanded, incorporating tools and techniques from "digital notetaking" and "mind mapping." In the early 2000s, the term "personal knowledge base" (PKB) emerged, highlighting the importance of centralized information repositories. With the rise of social media and collaborative platforms, PKM began to intersect with "social knowledge management," emphasizing shared knowledge creation and networking. Today, PKM is a holistic practice encompassing the integration of various digital tools and strategies to enhance productivity, learning, and personal growth.

During my PKM journey, my workflows and applications have evolved. Many tools and note-taking applications I started with no longer exist, and new ones continue to prompt my curiosity. My journey has led me to a single knowledge base or information repository that supports my entire life. Its primary purpose is knowledge management, but it also serves as a highly effective personal productivity tool. With the advent of artificial

intelligence (AI), my PKM system has gained a new dimension, functioning as an AI assistant that helps me manage my knowledge and tasks more efficiently.

Knowledge Objectives

For me, the ideal PKM solution must provide a single digitally searchable knowledge base, facilitate customized productivity workflows, provide individual note/notebook functionality, and have a platform-agnostic architecture. Although I am now exploring how AI can be leveraged, to date, my PKM objectives involve the following:

Robust Digital Storage - The system I've arrived at is capable of digitized storage of all possible mediums, including anything I've captured on paper, from the internet, e-mails, MS Office documents, PDFs, etc., into a single searchable knowledge base (KB) repository. Other than files stored in Microsoft File Explorer, my first actual PKM repository started in 2002 using an application known as InfoSelect by Micro Logic. I spent over 10 years using this desktop, client-based application, but in 2013, I recognized the need to migrate to cloud-based, cross-platform/device technology and selected Evernote. The migration process from InfoSelect to Evernote was not straightforward, as there was no easy way to move tens of thousands of InfoSelect notes into Evernote programmatically. Despite the challenges, I moved 26 InfoSelect "files," reflecting 219 MBs of notes stored in 43K searchable PDF pages, into Evernote, retaining 10 years of PDF data as searchable content.

Productivity Methodologies Integration - PKM wasn't just about storing and managing "knowledge"; it also served the purpose of professional and personal productivity. PKM, at a minimum, had to support structured workflows with task management integration. To this end, I've researched many personal productivity gurus and their espoused methodologies. To name only a few, I've experimented with processes advocated by David Allen (Getting Things Done), Atul Gawande (The Checklist Manifesto), Michael Linenberger (Total Workday Control), Stephen Covey (The 7 Habits of Highly Effective People), Tiago Forte (Building a Second Brain), Ryder Carroll (The Bullet Journal Methodology), Mike Rhodes (The Sketchnote Handbook), and Dan Roam (The Back Of The Napkin). The most influential productivity methodology I've gravitated to is David Allen's Getting Things Done (GTD). However, what I've arrived at is hybrid and reflects a "tinkering" process that has developed a productivity workflow unique to how I work.

Note Creation Foundation - A single note serves as the building block of any PKM system to capture discrete pieces of information, insights, and ideas. PKM applications must also support interconnected notes, tagging, categorization, and reminder functionality to review selected notes regularly. Notes could be e-mail, Word documents, meeting notes, internet articles, hand-drawn mind maps, Moleskine notebook journal pages, etc. Supporting this is the notebook, which provides the framework for storing and organizing individual notes. Building on this knowledge base of notes is a planned workflow sequence of spaced repetition reviews of relevant notes. With a knowledge repository of over 30K notes, not all are reviewed, but all are tagged and stored in a notebook structure that is easily understood and makes them available for easy and efficient search and retrieval when needed.

Platform Agnostic - Much of my professional career has been spent as a consultant. From a PKM perspective, this was a challenge due to my client's computer and application usage requirements. As my clients changed, so did my primary business computer, along with the back office and knowledge management applications required by the client. Working on two separate computers while attempting to maintain a shared repository of PKM data was challenging. As PKM applications became cloud-centric and I gained experience with dual computer usage required by clients, building a centralized

knowledge repository became less complicated. However, I have focused on selecting OS, device, and platform-independent technologies.

Technologies, Architecture, Tools

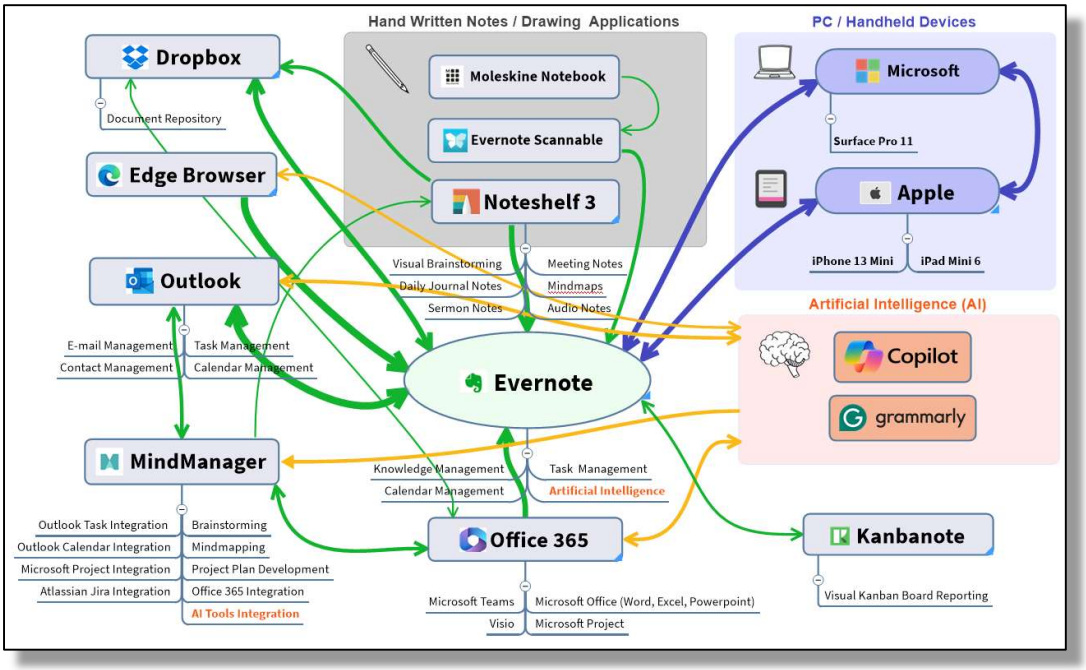
My PKM ecosystem and supporting architecture are diverse and have evolved as new and promising technologies became available. Some of the architectural requirements are summarized below:

Operating System Agnostic —Many of my employers and consulting clients leveraged Microsoft-centric platforms, so the core of my PKM is Microsoft. However, I've also leveraged and integrated Apple devices and applications into my PKM architecture. My PKM ecosystem must support the most promising iOS or Microsoft PKM applications.

Cross-Device Support—Microsoft and Apple devices are the foundation of my current PKM architecture. I use a Microsoft Surface Pro 11, Apple iPad Mini 6, and iPhone Mini 13. My handheld journey started in 1996 with a Palm Pilot 5000 device. I loved Palm Pilot products, followed by Web OS devices, but I finally moved to an Apple iPhone shortly before Palm went out of business.

Robust Integration / Synchronizations—All the applications I use leverage API, workflow automation applications, or proprietary technologies (e.g., RENT by Evernote) to provide synchronization functionality with other applications. Before considering any new application, a significant prerequisite is the availability of robust integration or application synchronization functionality, which all my current applications possess.

During my years of tinkering, I have discarded many PKM applications and personal productivity tools. Thanks to this continuous tinkering and experimenting, I have very little, if any, technical debt associated with my PKM ecosystem. Although subject to change, below is a summary of my primary PKM applications, how they fit together, and their primary purpose.



Evernote is the foundational PKM application I have used for over ten years. After Bending Spoons purchased Evernote and significantly increased pricing, I investigated other applications to switch to (e.g., One Note, Obsidian, Notion, The Brain, Apple Notes, etc.). However, over the last year, Bending

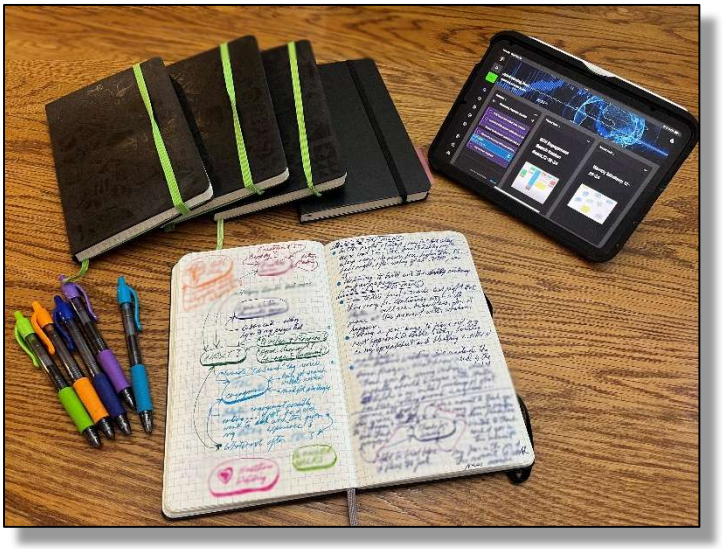
Spoons has made considerable improvements to the application that more than justify the price increase. Another benefit Evernote offers that makes it difficult to walk away from --- not to mention the difficulty with migrating data to a new application --- is the cross-platform / device functionality the application provides. Also, Bending Spoons has been working on its promising version of AI that would sit on top of my Evernote knowledge base.

Dropbox serves primarily as a file backup and storage repository for files that do not necessarily need to be moved into Evernote. However, it also serves as an Evernote "backup," as many of my handwritten notes and files moved into Evernote are copied to Dropbox. I have over seventy-three thousand files organized in eleven top-level folders representing 113 GB of Dropbox data. My Evernote notebook structure mirrors my Dropbox folder structure. A robust integration between Dropbox and Evernote is available, but I have yet to find a need to use this integration extensively.

Microsoft 365—All of my Microsoft 365 applications (e.g., Word, Excel, PowerPoint, Outlook, Project, Teams, Visio, etc.) either directly integrate or synchronize with Evernote, or selected files can easily be moved into Evernote or Dropbox as needed. The most heavily used Evernote integration is Outlook for e-mail and calendaring. With Outlook, I have an Evernote add-in that moves content, primarily e-mails, directly into the desired Evernote notebook with the desired meta-data attached.

Noteshelf 3—While I occasionally use Evernote's digital note functionality, Sketch, for basic/quick handwritten digital note generation, its capabilities are limited. Given the importance of handwritten notes, I have continually experimented with a wide range of smart pen notebook applications (e.g., Livescribe, RocketBook, Moleskine Smart Pen, etc.). I have settled on an application known as Noteshelf 3, which is a robust iOS-based note-taking application that interfaces with Evernote and Dropbox to move selected content into my PKM knowledge base.

Moleskine Notebooks / Evernote Scannable—My PKM journey began on paper; it is a medium I have never given up on. Backed up by research, I have found handwritten notes, especially from meetings, to be the most effective for enhanced memory retention and improved long-term recall. However, I have focused on technologies that can digitize my extensive collection of handwritten paper notes. My paper-bound notebook of choice is Moleskine; I use my Moleskine notebook almost daily for journaling, diary, sermon notes, mind maps, doodling, etc. I've experimented with several different technologies to digitize hand-written notes but have settled on an iOS application, Scannable by Evernote; Scannable uses the iPhone camera to quickly scan Moleskine pages into Evernote.



MindManager—For professional and personal purposes, I use MindManager for a wide range of efforts, including visual brainstorming, mind mapping, project planning, proposal preparation, and whitepaper development. MindManager has outstanding integration and bidirectional synchronization with most Microsoft 365 applications, including Word, Excel, Project, Powerpoint, and Outlook. My final MindManager documents are frequently exported to Microsoft 365 applications, followed by final storage in Evernote and Dropbox.

Edge Browser—Although I occasionally use Chrome, my primary browser is Microsoft Edge. I use several Edge browser add-ins and extensions, but the most significant is Evernote Clipper, which seamlessly moves browser content directly into Evernote.

Artificial Intelligence—Similar to the usage impact of other new technologies I've added to my PKM ecosystem over the years, I recently added Microsoft Copilot Pro and Grammarly for Windows AI applications. Although I am still learning new ways to use AI technologies, these applications are already integrated with nearly all my primary PKM applications. Also, the improving AI functionality Bending Spoons introduced to Evernote is a promising addition.

PKM Journey Recommendations

The PKM system I've developed is a second brain supporting my professional, personal, and spiritual life journey. For anyone beginning or already pursuing a similar journey, I recommend the following:

Continuous Customization—Develop a system for your unique knowledge management and productivity purposes. Don't stop there; continuously innovate to improve your system and processes.

Hybrid Productivity—Research interesting productivity methodologies, but select one that works for you. Don't be afraid to develop hybrid productivity workflow concepts that meet your unique work style requirements.

Technology Tinkering—Continuously evaluate and test new PKM technologies but select mainstream ones that seamlessly integrate with other applications and platforms and are likely to remain relevant over time.

Functional Simplicity—Select methodologies and technologies that serve a specific purpose and can be quickly understood. Don't invent a purpose for new or exciting methodologies or technologies that look fun to use but have no practical use case for your PKM needs in the long term.