

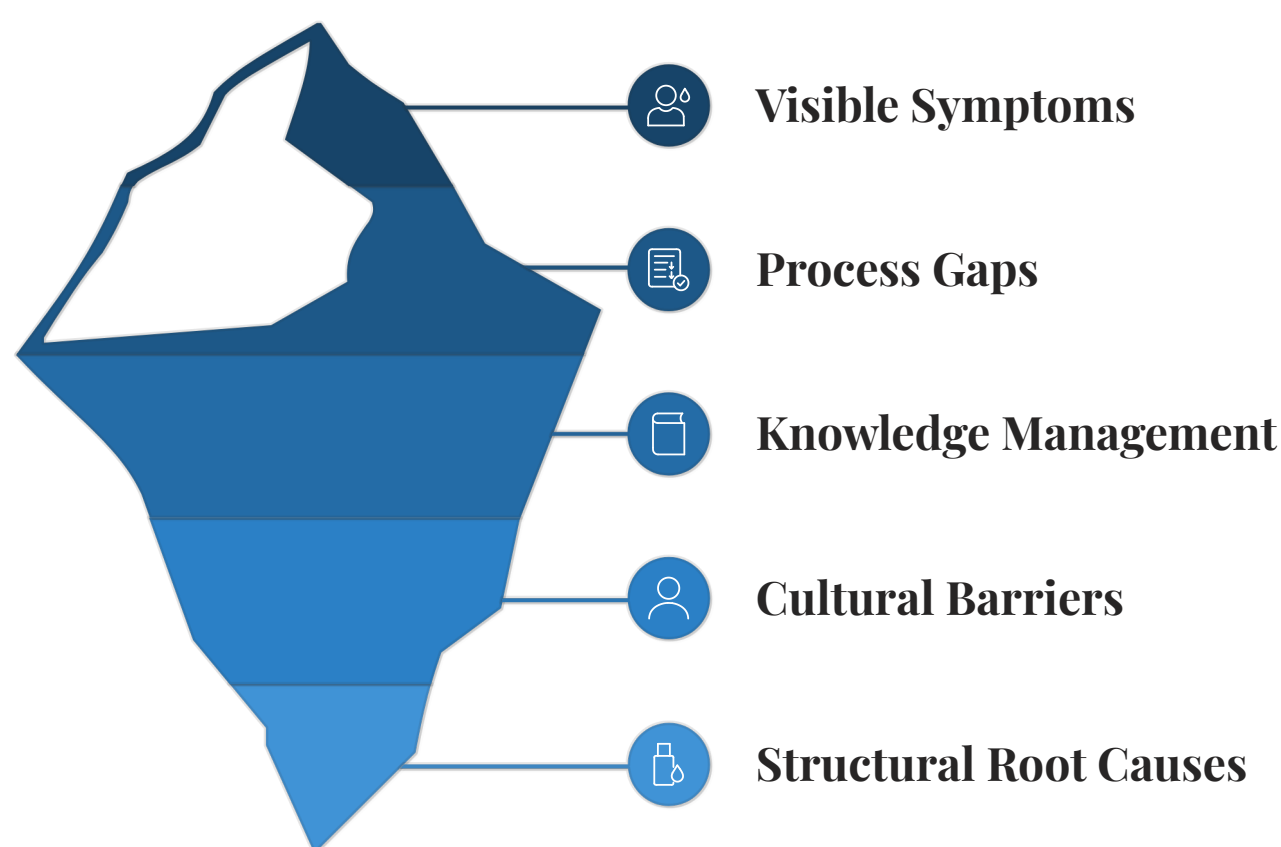


PKM Performance Checklist

Your complete system for capturing, organising, and activating personal knowledge — so nothing valuable gets lost and everything compounds over time. Designed for working professionals who are serious about turning information into competitive advantage.



Why Your Knowledge System Is Leaking



You read a brilliant article on Tuesday. By Friday, you cannot remember the source, let alone the insight. You attended a workshop last quarter that genuinely shifted your thinking — but you have never applied a single thing from it because the notes are buried in a folder you cannot find. Sound familiar? This is not a memory problem. It is a **system problem**.

Personal Knowledge Management (PKM) is the deliberate practice of capturing, organising, connecting, and applying the information that flows through your professional life every single day. Without a PKM system, knowledge evaporates. With one, it compounds. The difference, over a five-year career horizon, is enormous — in the quality of your decisions, the speed of your work, and the depth of your expertise.

This checklist was built for time-poor professionals who cannot afford to build a complex system from scratch. It gives you a modular, progressive framework you can implement in stages — starting today, with the tools you already use. Work through it sequentially the first time, then use individual sections as a quick-reference audit whenever your system feels sluggish or broken.

Without a system, knowledge fades quickly—ideas are forgotten, lessons aren't reused, and you end up starting from scratch more often than you should. With a PKM system, that same information builds over time. Insights connect, patterns emerge, and your thinking becomes sharper and faster.

The long-term impact is significant. Over a few years, PKM improves the quality of your decisions, increases your speed of execution, and deepens your expertise—because you're not just consuming knowledge, you're continuously compounding it.

What This Resource Solves

- Knowledge that enters your brain but never gets used
- Notes scattered across five different apps
- No system for connecting ideas across domains
- Insights from learning never making it into real work
- Feeling like you are always re-learning the same things

i Use this as a read-through first, then return to individual sections as a monthly audit checklist.

Capture — Build Your Reliable Inbox

The first phase of any PKM system is deceptively simple: **get things out of your head and into a trusted system**. Most professionals fail here not because they do not capture, but because they capture everywhere — sticky notes, phone memos, email drafts, Slack bookmarks, browser tabs. The result is fragmentation, not a system. The goal of Phase 1 is to reduce your capture points to as few as possible and make the habit frictionless enough to sustain.

1

Designate One Primary Inbox

Choose a single app (Notion, Obsidian, Apple Notes, or even a physical notebook) as your main capture point. Everything flows here first — no exceptions.

2

Capture in the Moment

Do not wait until later. The 10-second rule: if a thought or insight arrives, capture it within 10 seconds or accept it is gone. Use voice memos when your hands are busy.

3

Tag Minimally at Capture

Add one or two rough tags only — project name, topic area. Do not over-organise at capture time. The goal is speed, not perfection.

4

Schedule a Weekly Inbox Review

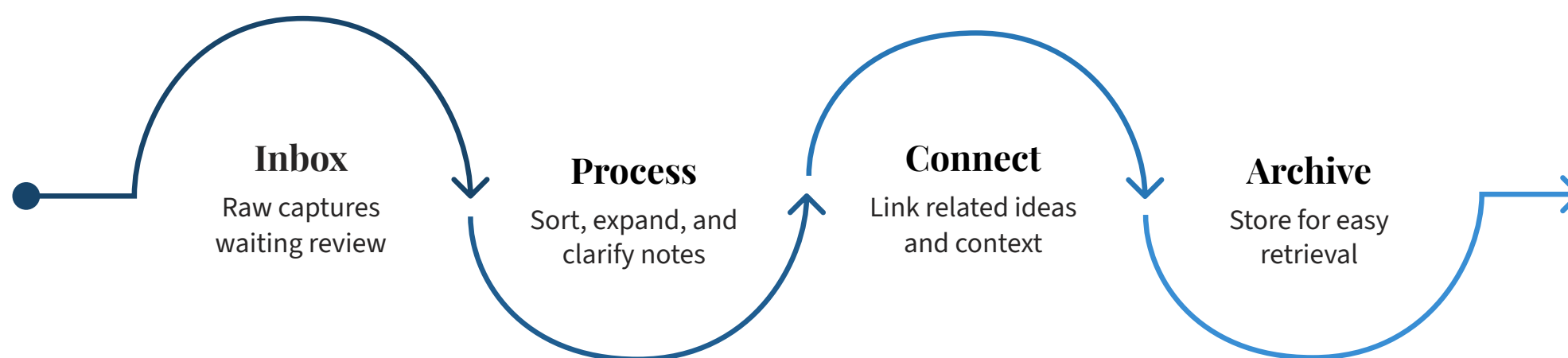
Block 20 minutes every week to process your inbox — sort, expand, or delete. An unreviewed inbox becomes another pile to avoid.

Capture Checklist

- | | |
|--|---|
| ☐ I have identified one primary capture tool | ☐ I take brief notes during meetings rather than relying on memory |
| ☐ I have deleted or archived unused note-taking apps | ☐ My email has a "To Process" label or folder for valuable threads |
| ☐ I capture ideas within 10 seconds using a shortcut or voice memo | ☐ I have a recurring weekly calendar block for inbox review |
| ☐ I have a browser extension or read-later tool (e.g. Readwise, Matter) for web content | ☐ My capture system works on both desktop and mobile |

Organise — Give Your Knowledge a Home

Captured information sitting unsorted in an inbox is just digital clutter with extra steps. Organisation is where your PKM system starts generating real returns. The key insight here is that you should **organise for retrieval, not for filing**. Most professionals organise like librarians — by category and type. High-performing PKM practitioners organise like detectives — by project, active question, and future use. This shift in mental model changes everything about how useful your system becomes.



The PARA method (Projects, Areas, Resources, Archives) popularised by Tiago Forte remains one of the most practical frameworks for professional PKM organisation. Projects are active deliverables with deadlines. Areas are ongoing responsibilities without end dates. Resources are topic libraries you may reference later. Archives are completed or inactive items. The power of this system is that it mirrors how professionals actually work — by outcome and accountability, not by subject matter.

Organisation Checklist

Structure

- ☐ I have a consistent folder or tag structure I can explain in under 30 seconds
- ☐ My notes are organised by project or area of responsibility, not just topic
- ☐ I use a naming convention that makes files searchable (date, project code, keyword)
- ☐ I have a clear "Archive" destination for completed projects

Maintenance

- ☐ I do a monthly review to move stale items to Archive
- ☐ I can find any note I am looking for in under 60 seconds
- ☐ Duplicates and abandoned drafts are purged quarterly
- ☐ My organisation system is tool-agnostic — it would survive an app switch

- ☐ Reflection: Think of the last time you could not find an important note. What broke down — capture, organisation, or naming? That answer tells you where to focus your energy first.

Connect & Distil — Build Thinking, Not Just Storage

This is the phase where most professionals stall — and where the highest-performing knowledge workers separate themselves. Connecting ideas means deliberately looking for relationships between notes across projects, time periods, and domains. Distilling means compressing information to its most useful, portable form. Together, these practices transform your PKM system from a **filing cabinet into a thinking partner**.

The Progressive Summarisation Method

When you revisit a note, highlight only the most important sentences. When you revisit again, bold the most important highlights. When you revisit a third time, write a two-sentence executive summary at the top. Over time, the most valuable ideas in your system float to the surface — without a single deliberate effort to memorise them.

Connection practices do not need to be elaborate. A simple habit of asking "What else do I know that relates to this?" when you add a new note — and then adding a link or cross-reference — is enough to build a genuinely networked knowledge base over months. Tools like Obsidian and Roam Research are built specifically for this, but even a simple tagging system in Notion achieves the same outcome.



Evergreen Notes

Write notes as standalone ideas, not meeting summaries. Make them reusable across contexts.



Linked Thinking

Manually link related notes. Every orphan note is a missed connection and a lost insight.



Distil Ruthlessly

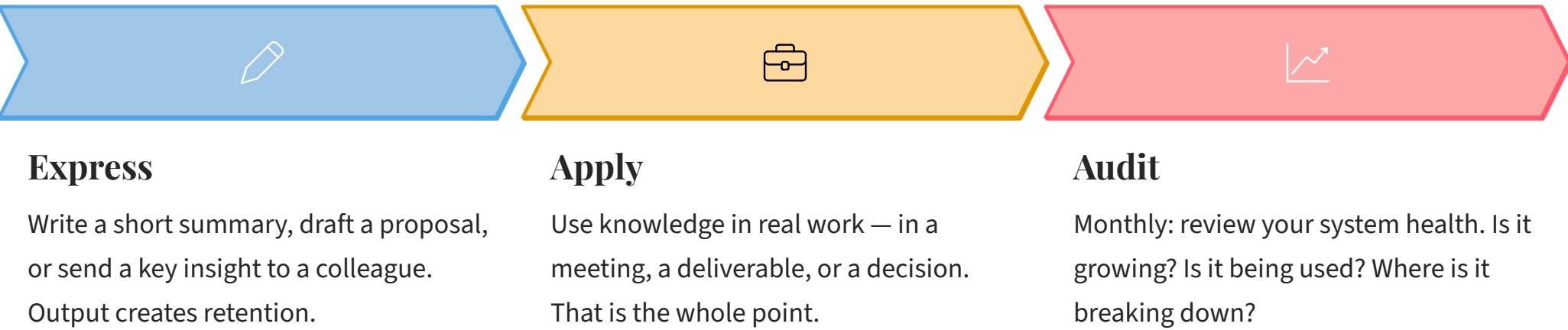
Ask: "What is the one sentence that makes this note worth keeping?" If you cannot answer, revise or delete.

Connect & Distil Checklist

- ☐ I write notes as ideas, not as raw transcripts of what I read or heard
- ☐ When I save a new note, I ask "What does this connect to?" and add at least one link
- ☐ I use progressive summarisation — highlighting key sentences on each revisit
- ☐ I have a "Best Ideas" or "Evergreen Notes" section that houses my most refined thinking
- ☐ My notes include my own commentary or reaction, not just the source's words
- ☐ I review my connected notes before starting a new project to avoid reinventing the wheel
- ☐ I periodically write synthesis notes that combine insights from multiple sources

Express, Apply & Audit – Close the Loop

Knowledge that is never expressed or applied is just an expensive hobby. The final phase of a high-performance PKM system is about ensuring that what you learn actually changes how you work, what you produce, and how you communicate. Expression does not mean publishing a newsletter — it means using your knowledge in a meeting, a proposal, a decision, or a conversation. Every time you apply a captured insight in a real professional context, your PKM system is working exactly as intended.



Expression & Application Checklist

- ☐ I regularly reference my PKM system before starting new projects
- ☐ I have used a saved insight to improve a deliverable in the last 30 days
- ☐ I share relevant knowledge with team members or peers at least monthly
- ☐ I write short "output notes" after meetings that link to relevant knowledge
- ☐ I do a monthly PKM health audit (see questions below)
- ☐ I have identified the weakest phase of my system and have a plan to improve it
- ☐ My PKM system evolves — I have changed or upgraded part of it in the last 90 days
- ☐ I could explain my PKM system to a colleague in under 2 minutes

Monthly Audit Reflection Questions

Capture Health

Is your inbox growing faster than you can process it? If yes, either increase review frequency or reduce capture sources. An overflowing inbox signals a broken review habit, not a broken capture habit.

Organisation Health

Did you struggle to find anything important this month? If yes, your naming convention or folder structure needs a rethink. Searchability is the only metric that matters in organisation.

Connection Health

Are you discovering surprising connections between ideas? If you are not, you are likely storing notes but not linking them. Schedule one "connection session" of 30 minutes this week.

Expression Health

Can you point to one concrete output — a document, decision, or conversation — that was made better by your PKM system this month? If not, your system is a library, not a thinking tool. Prioritise output habits immediately.

Key Takeaways

- 1

One inbox, always

Fragmented capture is the number one reason PKM systems fail. Consolidate to a single trusted inbox before optimising anything else.
- 2

Organise for retrieval, not filing

Structure your system around projects and outcomes, not categories. If you cannot find it in 60 seconds, the organisation system is not working.
- 3

Connection is where value compounds

Linked ideas build exponentially useful knowledge. Every orphan note is a missed opportunity. Link deliberately and consistently.
- 4

Distil relentlessly

Use progressive summarisation to surface your best thinking over time. The goal is not to store everything — it is to make the most important things instantly accessible.
- 5

Expression is the metric that matters

Your PKM system earns its keep only when it changes how you work. Track real-world application, not note count. Output is the ultimate audit.

"The purpose of a personal knowledge management system is not to store information. It is to **think better, decide faster, and produce work that only you could produce** — because only you have made exactly these connections."