

Notion for Personal Productivity — Workbook

This workbook turns the course into the real building work and decisions that make Notion run your tasks, notes, goals, and projects from one connected workspace. Each section maps to a course module: learning to think in blocks and databases, building a task and project system with relations and rollups, setting up notes and organising everything with PARA, and automating and reviewing so the system stays alive. Work through it in order and actually build the databases, properties, and views as you go, because Notion is only learned by doing, not reading. The included spreadsheet templates are meant to be imported into Notion or kept as a planning reference so you never have to rebuild your structure from memory.

Notion Foundations and How to Think in Blocks and Databases

Get fluent with blocks and the slash command, then build your first real database so the rest of the workspace has a foundation.

Exercise: Block and Slash-Command Drill

Create a blank Notion page and complete each task by hand so the basics become muscle memory. Write a short note on what you found for each.

- Type a forward slash and add a heading, a to-do, and a callout. Which slash shortcuts did you use?

- Use markdown as you type: a hash and space for a heading, a dash and space for a bullet, square brackets for a checkbox. What converted automatically?

- Grab the six-dot handle on a block and drag it to reorder, then use Turn into to convert a paragraph into a heading. What changed?

- Press Ctrl or Cmd plus P and search for the page you just made. How fast did it find it?

Exercise: Build Your First Database

Create the seed Tasks database the course is built around. Build it for real, then answer the prompts to confirm you understand what makes a database different from a plain list.

- Type `/database`, choose Table, and name it Tasks. Open one row as a page, what can you do inside it that a text table cannot?

- Add a Status property (use the Status type) with options To Do, Doing, Done. Why is Status better than plain text here?

- Add a Date property called Due and enter a few real tasks. Which view do you think this date will power later?

- Switch the same database to a Board view grouped by Status. Did any task move, or just the way you see them?

Worksheet: Workspace Intent Plan

Decide what this workspace is for before you build more, so you do not repeat the disconnected-pages mistake. Fill in each field honestly.

The apps or lists I want Notion to replace

The main areas of my life this workspace must cover (e.g. Work, Health, Finance, Home)

The one question I want my workspace to answer every morning

Notion plan I am using (Free, Plus) and whether I will add Notion AI

Past Notion attempts and why they failed (be specific)

My rule for what goes in a database versus a plain page

Checklist: Foundations Ready Checklist

- I can open the block menu with a slash and add headings, to-dos, and callouts.
- I built a real Tasks database, not a text table.
- My Tasks database uses the Status type with To Do, Doing, Done.
- I added a Due date property and entered several real tasks.
- I understand that each database row is a full page I can write inside.

Building Your Task and Project System

Design a lean task database, build the views you will check daily, and connect projects to tasks so progress tracks itself.

Worksheet: Task Database Property Plan

Pin down the properties your single Tasks database will use. Keep it lean, six well-chosen properties beat twenty empty ones. Write the exact options you will use.

Status options and stages (To Do / Doing / Done under To-do, In progress, Complete)

Priority options (e.g. High, Medium, Low)

Area Multi-select options (your real life areas)

Due date: how I will use it (reminders, Today view)

Project relation: which database it links to

My rule for phrasing a task as a verb-first next action

Exercise: Build Today and This Week Views

Create the two views that become your daily dashboard. Build each filter exactly as described, then answer the prompts to confirm they update themselves.

- Add a Today view filtered to Due is on or before Today and Status is not Done, sorted by Priority then Due. What appears, and does anything overdue show up?

- Add a This Week view filtered to Due is within the next 1 week and Status is not Done. How does it differ from Today?

- Mark a task Done in one view. What happens to it in the Today view, and why?

- Change a task's Due date to today. Does it appear in Today without you editing the filter?

Exercise: Connect Projects with a Relation and Rollup

Build the relation-plus-rollup structure that is the backbone of a connected workspace. Create it for real, then describe what you see.

- Create a Projects database, then add a Relation property on Tasks pointing to it. After assigning tasks, what appears automatically on each project page?

- On Projects, add a Rollup through the Tasks relation that calculates the percent of tasks Done. What does the project show now?

- Add a second rollup that counts related tasks or shows the earliest Due date. Which is more useful for your weekly review?

- Tick a task complete. What updates on the project, and how much manual tracking did you have to do?

Checklist: Task and Project System Checklist

All my tasks live in one Tasks database, not separate lists.

Every task is phrased as a verb-first next action.

I have a working Today view that updates automatically.

I have a This Week view and at least one board or calendar view.

My Tasks and Projects databases are connected with a Relation.

Each project shows live progress via a Rollup.

Notes, Knowledge, and Organising It All with PARA

Build a capture-friendly notes database, organise the whole workspace with PARA, and assemble a home dashboard from linked views.

Worksheet: Notes Database and Capture Plan

Set up your second-brain notes database and decide how you will capture without friction. Fill in each field with your real plan.

Note Type options (e.g. Meeting, Idea, Article, Reference)

Tag options I will use for cross-cutting search

Relation: which database notes link to (e.g. Projects)

Capture tools I will install (web clipper, mobile app)

My rule for turning a note into a task when it implies action

My titling rule so notes stay searchable (e.g. specific, dated)

Exercise: Sort Your Workspace into PARA

Apply the PARA method to what you already have. Go through your existing pages and databases and place each item, then answer the prompts.

- List three current Projects (short-term, with an end goal). How do they differ from Areas?
 - List your ongoing Areas of responsibility (no end date). Are these consistent across Tasks, Projects, and Notes?
 - Identify reference material that belongs in Resources. Where will it live, and how is it tagged?
 - Pick something finished or inactive and Archive it. What disappeared from your active views, and is it still searchable?
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Exercise: Build Your Home Dashboard

Assemble the page you will open every morning using linked views, not copies. Build it for real and describe your layout.

- Create a Home page and add a linked view of Tasks filtered to Today using /linked. Did it copy the data or link to it?
 - Add linked views of This Week tasks and active Projects. How did you arrange them into columns?
 - Add a linked view of Notes sorted by Created time. What does this give you each day?
 - Use a synced block for something you want on two pages, like your goals. What happened when you edited it in one place?
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Checklist: Knowledge and Organisation Checklist

- I capture all notes into one Notes database, not loose pages.
- Capture is frictionless via the web clipper and mobile app.
- Every item in my workspace fits Projects, Areas, Resources, or Archive.
- Finished projects and notes are archived, not deleted, and filtered out of active views.
- My Home dashboard shows Today tasks, active projects, and recent notes from linked views.

Automation, AI, and a System That Keeps Itself Alive

Automate repetitive setup, put Notion AI and a simple formula to work, and install the daily and weekly review that keeps everything trusted.

Exercise: Automate the Repetitive Parts

Build the templates, button, and recurring date that remove repetitive setup. Create each for real and note what it saved you.

- Build a Meeting Note database template with Attendees, Decisions, and Action Items headings. How much typing does it save per meeting?
- Create a quick-add task Button on your Home dashboard with Status To Do and Due today. How many clicks to capture a task now?
- Turn on Repeat on a recurring task's Due date. What interval did you choose, and what happens after you complete it?
- Set your most-used template as the database default. What step did that remove entirely?

Worksheet: Notion AI and Formula Plan

Decide where AI and one simple formula will help, so you use them deliberately rather than as gimmicks. Fill in each field.

Tasks I will use Notion AI for (summarise, extract action items, draft, improve writing)

My rule for checking AI output before trusting it

The one formula I will add (e.g. Days Left from Due date)

Where I will show or sort by that formula (e.g. Today view)

One piece of complexity I am choosing NOT to add yet, and why

Worksheet: Daily and Weekly Review Plan

Design the review loop that makes the whole system stick. This is the most important page in the workbook, fill it in concretely.

When I will do my 2-minute daily check (morning and evening triggers)

Day and time of my 20-30 minute weekly review

My weekly review steps (clear inbox, review projects, tidy tasks, check goals, archive finished)

Where my Weekly Review template or checklist lives

How I will protect the weekly review from being skipped

Checklist: Living System Checklist

- I have database templates for meetings and projects so structure is automatic.
- I have a quick-add task button on my dashboard.
- My recurring tasks regenerate on schedule via Repeat.
- I use Notion AI for tidying and drafting, and I check its output.
- I run a 2-minute daily check every morning and evening.
- I have a scheduled, protected weekly review and a template to run it.

Your Action Plan

1. Choose your Notion plan and build your seed Tasks database with the Status type (To Do, Doing, Done) and a Due date.
2. Add Priority and Area properties and rewrite your existing tasks as verb-first next actions.
3. Create a Today view (Due on or before today, not Done, sorted by Priority then Due) and a This Week view.
4. Build a Projects database and connect it to Tasks with a Relation, then add a Rollup for live project progress.
5. Set up a Notes database with Type, Tags, and a Project relation, and install the web clipper and

mobile app for capture.

6. Sort your whole workspace into PARA: Projects, Areas, Resources, Archive, and filter archived items out of active views.

7. Assemble a Home dashboard from linked views showing Today tasks, active projects, and recent notes.

8. Create database templates for meetings and projects, a quick-add task button, and turn on Repeat for recurring tasks.

9. Add one Days Left formula and try Notion AI to summarise a note and extract its action items.

10. Install the loop: a 2-minute daily check every morning and evening, and a protected 20-30 minute weekly review.

