

How to Get Started with Getting Things Done

By Robert Landon

published on BNET.com 2/08/2007

David Allen's Getting Things Done time-management system is based on some pretty esoteric concepts ("knowledge work," "distributed cognition," the "ready state" of martial arts, and so on), but in actual practice it's cheap and very much do-it-yourself. His bestselling book, Getting Things Done, lays out the method comprehensively, but his fans are so legion that you can actually piece together the elements of his program just by browsing the blogosphere. The tools and technologies you use are almost entirely of your choosing. Post-It notes, a smart phone, your own jacked version of Outlook-Allen claims that any or all of these will work, as long as they're deployed in the rigorous ways the book spells out.

Things you will need:

- minimum start up cost: \$50 (some of Allen's acolytes spend hundreds on seminars and sessions with personal coaches)
- two full days, back-to-back and with minimal interruption, then one to four hours a week, ongoing
- **Office Supplies:** file folders, paper-holding trays, a pen, a calendar, and some paper are all you need to get started
- **Allen's Book:** you don't have to buy it, but Getting Things Done: The Art of Stress-Free Productivity has lots of helpful details on implementation
- **Adaptability:** GTD requires small actions throughout the day-at your desk, in meetings, at home, while commuting-that may require a serious change in mindset.
- **(Optional) GTD Software:** GTD hackers are constantly creating free templates and applets that bring GTD functionality to programs like Outlook, Gmail, and Lotus Notes.

A yellow sticky note with the text 'step 1' written in black.

Clear the Decks

GOAL: Record all your commitments to free up mental energy and start accomplishing things.

GTD is a totalizing system, so don't expect to just ease yourself in. The first big push is key, and it requires a major, two-day collection process, in which you're supposed to gather up every single thing that requires action on your part: unopened mail, emails, voicemails, countertop clutter, reading materials, scary catch-all cabinets you can barely open. For larger items that don't fit into a desktop inbox-a broken fridge, a leaky faucet-just make an individual note and add it to the pile. Allen suggests that you devote a separate sheet of paper to each idea or project. A discrete, physical object helps make an idea more concrete, and it lets you track each item individually, increasing its chances of getting done.

When all your physical rubble is more or less in one place, it's time for a "mind-sweep": the processing of writing down everything in every aspect of your life that you want to get done-now, next year, or sometime before you die.

The Nitty Gritty

Trigger List

Chapter 5 of Getting Things Done has a helpful trigger list to jog your memory about commitments you've made or want to make. There are more than 200 items on the list. Here are ten of them:

Professional:

- Policies/Procedures
- Commitments/Promises to Others
- Installation of New Systems/Equipment
- Forecasts/Projections
- Training/Seminars

Personal:

- Vacation Plans
- Books/Records/CDs
- Vehicle Repair/Maintenance
- RSVPs
- Civic Issues/Community

step 2

Empty Your Inbox

Goal: Break tasks down into actionable steps.

Once you've compiled your inventory of unfinished business, it's time to process each and every item. Don't worry, that doesn't mean you have to resolve every single item. By "process," Allen simply means that you have to determine a "next-action": the very next thing you need to do, either to resolve an issue or at least keep it moving toward completion. Many items you'll only need to file-or throw away.

What does a next-action look like? Say you want to clean out your garage, but you can't because a broken refrigerator is taking up the space you need for reorganizing. Your next-action could be "Call Goodwill to fetch the dead fridge." Got a looming product launch and feel out of the loop? Write down "Go into Outlook and set up a strategic planning

session." Need a pencil sharpener? The process might start with "Download document that explains company procurement software."

It's basic stuff, really, but Allen adds some hard-and-fast rules:

- **No frontsies.** Address things one at a time, beginning with the top item in your pile and working your way down. Don't move on to the next item until you have determined what next-action is required. Some items may require hard thought; take the time to do it now. If you leave it until later, it won't be any easier, and meanwhile, it will continue to occupy valuable mental space.
- **Two-minute actions.** If a next-action can be completed in less than two minutes, Allen says do it right way, the first time you have the item in front of you. Not only do you get all the rewards of rapid turnaround ("Mail proposal letter" could give you a one-week jump on the competition; "Call FTD" nets a happy spouse), but, Allen argues, you've also freed up your mind for whatever's next.
- **Delegate and defer.** For any item longer than two minutes, you can either delegate it (shout over your cubicle, shoot an email to your admin), or simply defer it to what Allen calls a "trusted system"-the combination of calendar, file folders, and action-item lists that form the backbone of GTD. To find out what that might look like, keep reading.

DANGER! DANGER! DANGER!

Beware the Junk Drawer

As you gather items into a pile, Allen warns to watch out for the purge-and-organize bug. If you get overly focused on, say, an overstuffed closet, you may not get through the entire collection process, which is vital. What to do? Write "clean out closet" on a piece of paper, put it in your collection pile, and move on.

step 3

Feed Your "Trusted System"

Goal: Put your action steps into categories where you can review and complete them easily.

Roll up your sleeves, ladies and gentlemen, because now we're getting to the meat of Allen's program. It's time, in Allen lingo, to "organize"-put all those next-actions into a system that enables you to get them all done.

His idea is that you must go beyond laundry lists of actions. In the short run, such lists quiet nervous minds, but for most, he says, they invariably contain a handful of items that never get crossed off. They may be pleasures that you never get around to-like "take guitar lessons" or "play bridge more"-or little things such as "get pants mended." Often it's the big things-"get new job," "help solve world hunger"-that remain unresolved. Allen says that the answer in

each case is to determine your next-action-"ask Tom the name of his tailor," "update resume," "send donation check"-then enter it into your personal-organization system.

Needless to say, Allen has some ideas about how to organize your organizational system. Here are the key concepts:

- **Design your own trusted system.** Develop the combination of calendar and written action lists that will work best for you. Lists can go into a loose-leaf binder, your Treo, scrap paper, the back of your hand-whatever. Calendars can range from Outlook to a hand-ruled spiral notebook.
- **Make contextual lists.** Organize actions into separate lists defined by the circumstance required to complete them. For example, you can categorize tasks based on whether you do them on the phone, online, at your office desk, at home, or while running errands in your car. The idea is that you'll move more quickly through a single kind of action than if you keep switching back and forth between mental modes, technologies, and/or physical locations.
- **Record projects.** Allen defines a "project" as anything that requires more than one step, and he strongly suggests that you keep a separate file for each, whether they be small things like "get new couch" or big things like "department reorganization." He also has very explicit instructions about how to set up a system for those files. He prefers a strict alphabetical filing system (rather than grouping by category), and he distrusts hanging folders.
- **Keep a "someday/maybe" list.** Record and regularly review projects that you hope to accomplish someday, even if there is no urgency-or time-for them right now. It's fine to leave them right where they are, but creating the list and defining the item as currently undoable, Allen says, frees up mental energy that can be used more productively elsewhere.
- **Keep a "waiting for" list.** What deliverables are you expecting, whether from your boss, spouse, or direct reports? Allen recommends tracking these in a separate list. Some practitioners further organize their pending file by person and/or organization, so that they can go over everything in a single interaction.

Other Resources

Online Tools

GTD acolytes have designed a host of software tools intended to help you build your trusted system, such as GTDgmail, a Firefox extension for Gmail. Jeff Sandquist's [GTD Tools](#) page is a one-stop resource that offers a selection of freeware for various GTD calendar systems, both for Macs and PCs.

Repeat Weekly

GOAL: Set aside time each week to review your action lists, so that no items go uncompleted.

Life is a moving target. New data, new demands, and new opportunities keep showing up. You've just organized all of them, sure, but the system begins to age as soon as you go through a morning's worth of email. Hence, the "weekly review"-the linchpin of GTD and also, by all accounts, the place where adherents are most likely to get sloppy.

Essentially, the weekly review is an abbreviated version of all the preceding steps. You gather all your stray documents, notes to yourself, desktop clutter, and detritus of the week, then submit each item to your "process" and "organize" routine. Once you've done this, Allen includes a checklist of steps, best completed in order:

- Review previous week's calendar for outstanding items.
- Review and update upcoming week's calendar, so you know about time-sensitive items on the horizon.
- Conduct a "mind-sweep," i.e. write down all those ideas kicking around your head, whether or not they're for the upcoming week.
- Review project files one by one and determine next-actions for each.
- Review contextual lists and mark off completed actions.
- Review "waiting for" lists and follow up on over-due items.
- Look at your "someday/maybe" list-any dreams deferred that you now have the bandwidth to handle? Anything that has become time-sensitive or urgent?
- "Be creative and courageous" is Allen's last step, a tickler to think inventively of new possibilities.

Voice of Experience

"I've learned from personal experience that a few hours early Friday afternoon is one of the best times for a weekly review. You can capture any remaining open loops while events are still fresh, make necessary contacts while people are still at work, and then head into the weekend with a clear head, ready to relax and recreate."

- Peter Gallant, President and CEO, Pathogen Detection Systems, Inc.

Get Things Done

GOAL: As small action items move off your lists, contemplate larger projects and life goals.

According to Allen, deciding what to do-be it on a daily, hourly, or even minute-by-minute basis-requires trust in some invisible, whether you want to call it your heart, your spirit, your gut, your intuition, or the seat of your pants. Allen provides distinct models for deciding where to focus your energies as you stare at your calendar and action lists:

- **Action in the moment:** Consider your context (are you at work, in your car, lying on your couch at home?), time available, energy available, and priorities.
- **Daily work:** Allen says we engage in three kinds of activities-pre-defined activities (things already in your calendar or on your lists); work as it shows up (phone calls, emails, people turning up at your office door); and defining your work (planning, scheduling, making lists, setting priorities, brainstorming). It's key that none of these overwhelms the other two. The key pitfall is letting seemingly urgent new items distract you from planning, as well as from equally important stuff that is already in your system.
- **Reviewing your work:** Allen says there are six levels at which you can view your work, ranging from "the runway" (current actions) through "10,000 feet" (long-term projects), right up to "50,000 feet" (life). But rather than telling you to start at the top and cascade your way down (like other personal-management systems), Allen advocates a bottom-up approach. That is, as you take care of urgencies and clear out your mind of clutter and worry, you actually make room for effectively considering higher-level goals.

The Big Idea

Making GTD Work

Allen says you must address all your commitments, personal and professional, for GTD to really work; the smallest cracks in your implementation create larger problems. For example, when a to-do list is not exhaustive, Allen says you lose trust in it, and you're actually less likely to accomplish every item than if the list were complete but much longer. "Ninety-nine percent is a bitch; 100 percent is a breeze," says one long-term practitioner who helps implement GTD at his Fortune 500 company.