Cheat Sheet

MASTER
GETTING THINGS
DONE
...in 2 Minutes

Updated with New Downloadable Extras

The Practical Summary of David Allen's Productivity System

2 Minute Insight

Master Getting Things Done Productivity System

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Introduction

Getting Things Done (GTD) by David Allen has become a national classic since its inception in 2002. The productivity process is best for people who have so many tasks to work on that they need massive organization to make sense of it all. The overarching theme is keeping everything out of your mind. The end result isn't just that you're more organized, but that you don't stress out as much with the ability to function methodically and execute seamlessly.

Getting Things Out of Your Head

·   Feelings of being overwhelmed, stress and anxiety are caused by mental overload. There is a limit to how much "unresolved stuff" the mind can hold.

·   Your conscious mind should be used as a focusing tool, not a storage place.

·   **If you have not clarified what the intended outcome is for a situation, decided the very next physical action step, or put the reminders of outcome and action in a system you trust, your mind will not stop working overtime.**

·   It is possible for a person to have **an**

==overwhelming number of tasks to do== and still function with ==a clear mind and a sense of relaxed control.==

· The goal is to put everything in a trusted system in order to clear up the clutter and open your mind to higher levels of thinking.

A Fast Exercise to Clear Your Head Now

==ACTION 1:== Describe the one open loop that is most often on your mind **into an outcome-oriented sentence**. This sentence is now a "project" with an intended result. *(Ex: Decide when to look for a house; sign contract with ABC Corp.)*

ACTION 2: Write down **the next physical action** that is needed in order to move this situation forward.

The Big System Overview

5 Steps of the GTD System

COLLECT
Physical & Mental Sweep

↓

PROCESS
Emptying In-Basket

↓

ORGANIZE
Putting Unresolved Stuff Into Buckets

↓

REVIEW
Daily & Weekly Review

↓

DO
Deciding On Actions

Step 1 **COLLECT**

- **The Physical Sweep** - Collect all loose papers and physical items that don't belong where they are and put them or reminders of the action related to them into an "in-basket." This "in-basket" can take any form.

- **The Mental Sweep** – Then, do the same with all your mental thoughts, ideas and incompletes or open loops. Put one thought on one page of paper and into the in basket. (Use the trigger list on page 114 of the book.)

- **Collect Everything** - The reason to collect everything is not because everything is equally important. Its because your psyche bugs you about *all unresolved "stuff," regardless of the actual magnitude of the issue*. For the first time and the biggest overhaul,

budget between 1 to 20 hours.   Sequent reviews should be under 2 hours.

Step 2 **PROCESS**

Processing is not doing. It means deciding what the item is, what action is required, and organizing it into the right buckets (see Step 3).

DO	DON'T
• Pick the top item first.	• Put anything back into the "in-basket."
• Pick one item at a time.	• Pick and choose items based on what's more "attractive."
• Complete the action if it takes less than 2 minutes.	• Spend excess time on any one item. Aim for less than 30 seconds (rapid decision-making).

Better Project Planning

What Is A Project? <mark>**A "project" in GTD is any result you're committed to achieving that will take more than one action step to complete.**</mark> It can be personal *(spend more time with my son)* or professional *(divest the ABC product)*.

Reactive Planning - Situations will always come back to the natural project planning model above. It is just a matter of how much costs in time and money have been incurred prior to getting there.

How Much Planning Do You Need To Do? As much time or detail as necessary to get it off your mind.

5 Phases of Natural Project Planning

1. Define Purpose	• Ask "Why are we doing this? What are we ultimately trying to accomplish? What's the vision?"
2. Envision Outcome	• Envision what this project or situation will really be like when it successfully appears in the world.
3. Brainstorming	• Brainstorm potential ideas that can make the envisioned outcome and purpose/vision happen. Go for quantity of ideas, not quality. Don't worry about analysis or organization. Anchor ideas with pen/paper or equivalent.
4. Organizing	• Once you get all the ideas out of your head and in front of your eyes, you will automatically notice natural relationships and structure.
5. Identifying Next Actions	• Break new projects into physical action steps. Continuously ask "What's the next action needed to move it forward?"

Break New "Project" Down Into Physical Action Steps

You can't complete an entire project, only bite-sized next actions. **When in doubt, always ask yourself, "What's the next action to move this forward?"**

· **Example:** Project - Buy a house. Action 1: Find the realtor's phone number. Action 2: Call and make appointment with realtor.

· **Tip:** Add estimated time next to actions to allow rapid choices in the moment.

· **Benefits:** Doing this forces you to execute automatically like a well-oiled engine. Having a clear action outline

prevents procrastination due to imagined complexity.

· **Result:** Projects are then methodically and magically completed without burdening your mind by rethinking what has already been defined all the way to the last action step.

Physical Tools and Workstation

The GTD method advocates simple tools based on inherent, natural function and how people naturally work, not cost, hype or fancy technology.

Why You Need Systems And Tools - The right tools and systems are magical, as they subconsciously keep you on track. Those with the highest productivity are often those who utilize the best tricks in their lives.

Essential Productivity Tools

1. **Paper holding trays** – Used as the "in-basket," "out-basket," "read/review" stack, or other in process support paper. Get multiple.

2. **Smooth ballpoint pen** – Invest in smooth-writing, good-looking pens; it subconsciously propels you to rapidly capture ideas and thoughts on paper.
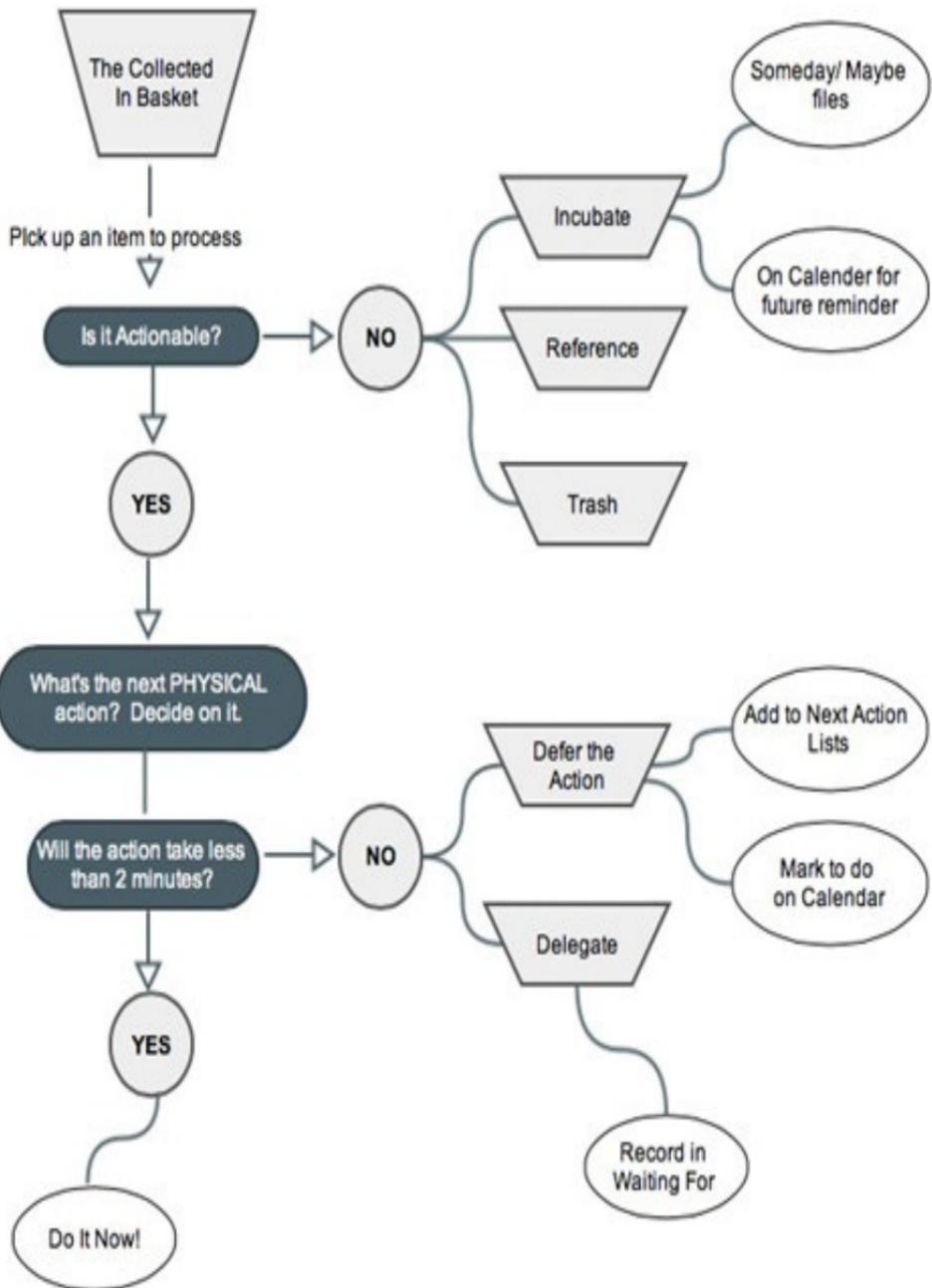
3.   **Plain full-size paper** – Used for capturing thoughts in the collection process. There is tremendous value in putting one thought on a single, full-size paper.

4.   **Auto labeler** – Prints out nice-looking labels to label files. Unconsciously, it makes filing fun, organized and efficient while looking nice across a boardroom table. It should become as basic a tool as your stapler! GTD advocates the Brother brand and one with an AC adapter.

5.   **Fresh folders** - Keep a giant stack of fresh, new file folders instantly at hand and reachable. Used to organize reference items while processing the in-basket.

6.   **High-quality file cabinets** – Used to file plain folders of reference material. Drawers should glide open and click shut with smoothness and solidity. Don't skimp on quality here.   **TIP:** Keep drawers less than ¾ full and cabinets within hand's reach ("swivel chair distance"). No hanging files; just use plain folders that stand up by themselves. Purge once a year.

7.   **Calendar** – Used to capture appointments and tasks that must be completed that day. It can be either physical or electronic, as long as you use it.

The Tools You Don't Need

1.   **Fancy executive organizers** – Not essential. All you really need to do is create and manage lists. Once you master that, the medium is totally flexible.

2.   **Digital project software** – Not essential. All you really need in order to manage projects are simple digital outlines with bullet points. Microsoft Word (or equivalent) is fine. GANTT chart software is useful for a small percentage and is unnecessarily complicated for most.

Step 2   **Processing "In" Illustrated**

The Collected In Basket

Pick up an item to process

Is it Actionable?

NO → Incubate → Someday/ Maybe files
Incubate → On Calender for future reminder
Reference
Trash

YES

What's the next PHYSICAL action? Decide on it.

Will the action take less than 2 minutes?

NO → Defer the Action → Add to Next Action Lists
Defer the Action → Mark to do on Calendar
Delegate → Record in Waiting For

YES

Do It Now!

Step 3 **ORGANIZE**

GTD advocates 7 essential categories below. **Important:** All categories must be kept distinct from each other with hard edges. If they begin to blend, you won't trust the system. The usefulness will be lost. **Tools:** All you need are lists and folders, either physical or digital, to implement it.

1. **Current "Projects" lists** - A simple list of all current, open loops. This allows you to have an elevated perspective as often as needed and define next actions to move them forward. Further categorization here is optional and personal. The most

important thing is consistent review for actions.

2.   **Project support material** - Ideas, thoughts and support material for projects. Avoid the impulse to use support material as ambiguous action reminders. You must first define the next actions to execute effectively.

3. **Calendar** – Can be physical or digital. Treat the calendar as sacred and only include appointments or tasks **that must get done that day**, not things you'd like to get done.

4.   **Deferred actions lists – organize them by context, either by location, tools or person.**   Take the lists with you. The genius of this method is twofold. First, it allows for automatic

batching and spontaneity. When you're at a computer and have 30 minutes, you can pick and choose from the computer list and knock out tasks in that window. Second, it allows you to take advantage of the odd, weird moments (i.e., waiting in the dentist office) to efficiently run through your lists and maximize those situations to get things done. Life is full of those little windows of time.

Sample Action Lists - You can name the lists whatever you want; just follow the rules of context, tools, and person.

Calls - Write the phone number itself alongside each item. It will prompt you to make fast batched calls in the moment.	**Computer** - If you have a computer where only some things can be done there, separate it into "At Computer" and "At Office" actions.
Errands - When you are out and about in an area, its great to be able to look at the list (for things to pick up or check off) while you are on the road.	**Agendas** – Have a different action list for each frequent meeting or person. Many next actions need to occur in a real-time interaction with someone or be brought up in meetings.

5. **"Waiting For" list** – Track all things you are waiting for. It's essential to clear the psychic RAM. Review as needed to tackle any follow-up actions.

6. **Reference material- All** non-actionable items. This is your personal library of contacts, archives and information. Make sure it's clearly separate from all actionable items.

7. **A "Someday/Maybe" list** – All things in all areas of your life you may wish to do in the future. Part wish list, bucket list, misc. idea list and a general "on hold" area. Having this distinct section allows for: 1) a clearer focus on the present, knowing that future buckets are safely captured and 2) a fast weekly review to move the Someday/Maybe into the current project radar when

timing is right.

REVIEW

Daily Review

1. Look at your calendar first.

2. Look at your action lists. (The calendar will dictate if you have time to proceed to action lists.)

Weekly Review

·   **The weekly review is the heart of the GTD process.** It by itself can dictate the successful or failed mastery of the

system.

- **Time + environment is important:** Pick a time and place where you have limited interruptions and everything related to the week is still fresh in your mind (Ex: 2 hours on Friday afternoons).

- **Why is the weekly review essential?** Your mind needs a regular, elevated perspective to close all the new open loops at new time intervals. With the passage of time, your mind will be forced to engage back at the lower level of storing and remembering. This brings us back to where we started: mental overload, stress or anxiety. Remember, your conscious mind should be a focusing tool, not a storage place.

· **Clearing the psychic RAM** – Frees you up to take on bigger, more exciting and ambitious projects.

Suggested Drill for the Weekly Review

Use the GTD weekly drill below as a general guide. We recommend that you make your own that is relevant to individual habits, especially the tools you leave ideas and thoughts in (iPhone, Evernote, desktop notepad). Capture and collect all open loops.
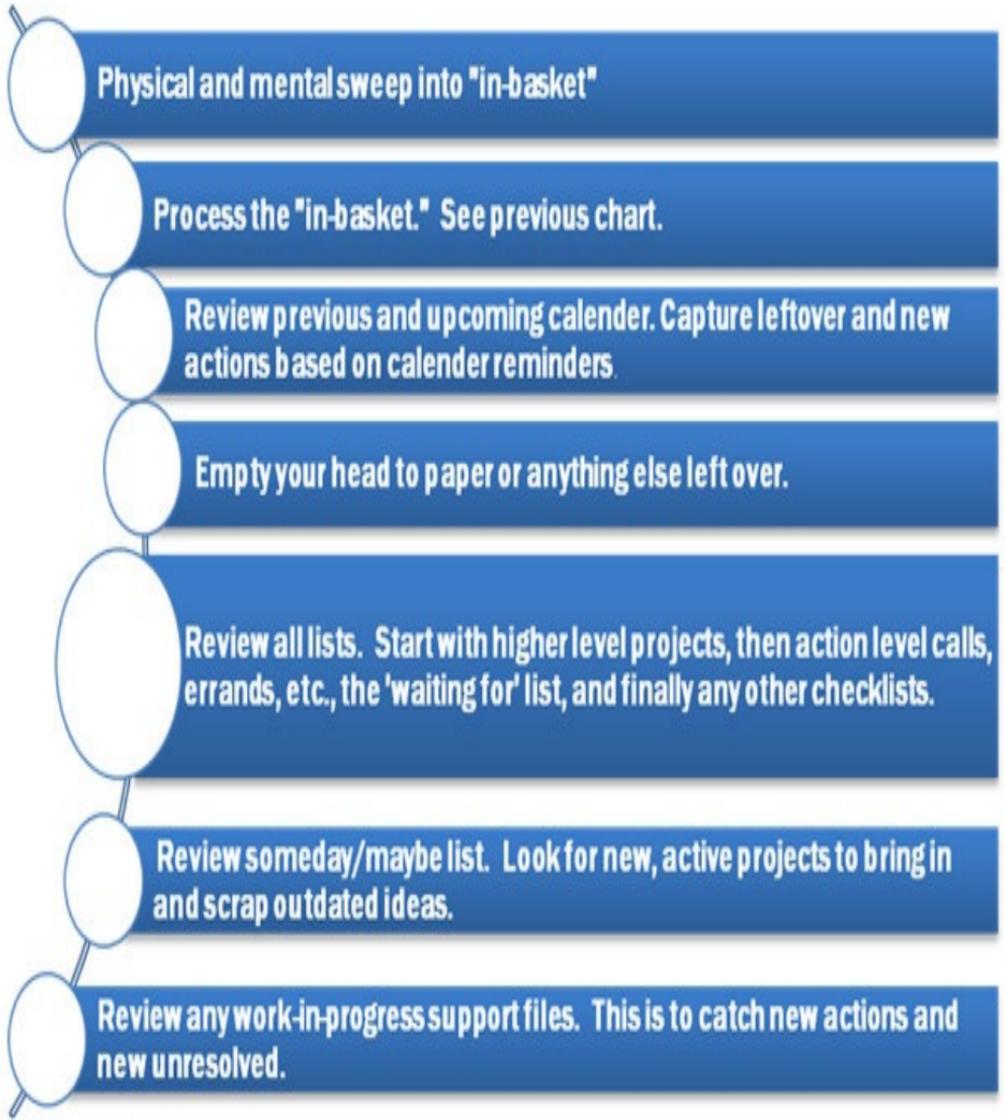
Physical and mental sweep into "in-basket"

Process the "in-basket." See previous chart.

Review previous and upcoming calender. Capture leftover and new actions based on calender reminders.

Empty your head to paper or anything else left over.

Review all lists. Start with higher level projects, then action level calls, errands, etc., the 'waiting for' list, and finally any other checklists.

Review someday/maybe list. Look for new, active projects to bring in and scrap outdated ideas.

Review any work-in-progress support files. This is to catch new actions and new unresolved.

Step 5 DO

How to Choose the Best Action in the Moment

1. **Context** – What can you do now with the tools you have?   If you are stuck in traffic and away from everything, the only thing you may be able to do is run down your "call" list.

2. **Time Available** - How much time do you have?   If you have a 15-minute break before a meeting, find a quick action to do.

3. **Energy Available** – How much energy do you have?   Execute the important when you have high energy. Keep a list of things that require little mental or

physical energy (organize receipts, file backup, etc.) and do them when you are in low energy mode.

4. **<mark>Priority</mark>** - What is the most important thing to do out of all the items?

Dealing with Unexpected Work: The Psychology of Mental Calm

·   Today, much work is unplanned and unexpected (Ex: your boss drops a new task due this afternoon or a customer has an emergency). Being caught up in the day-to-day fires means the preplanned work is unattended.

- When you are uncomfortable with the tasks you are ignoring in favor of the urgency of the moment, guilt, mental angst, and frustration build up.

- To solve this, **you need to make a conscious choice** between the preplanned and the seemingly urgent at the moment. Then, renegotiate any timeline agreements with yourself.

- **This simple and conscious mental alignment combined with the elevated perspective of the weekly review is enough to regain control and relax your mind in the face of daily surprises.**