



PAPER ORGANIZERS

Setup Guide

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FOCUS OF THIS GUIDE

EXPLANATION OF HOW TO BEST USE THIS GUIDE

WHAT YOU CAN EXPECT

Our focus with this Guide is to show you how to use a paper organizer for your GTD[®] workflow. This Guide will focus on configuring and populating a paper organizer for your Project lists and plans, Next Actions lists, References, Calendar, Contacts, and more.

If you are new to a paper organizer, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity. If you already have an established system in a paper organizer, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

This Guide will focus on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including a paper organizer. Your "reference" information is a good example of that—it's unlikely that a paper organizer will be able to hold all of your reference materials. You will likely have online and physical filing systems for that as well.

Whatever configuration you choose for tools like a paper organizer, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu you could still easily maintain them.

We hope these suggestions give you good direction for building a trusted GTD paper organizer for yourself. Have fun with this and be willing to adapt our suggestions to meet your specific needs.

OK...let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

UNDERSTANDING THE GTD BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

To get the most out of your paper organizer as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done”, the groundbreaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete next steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do in any given moment.

THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This Guide will leap forward to the Implementation stage, by configuring your paper organizer as a tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹*Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

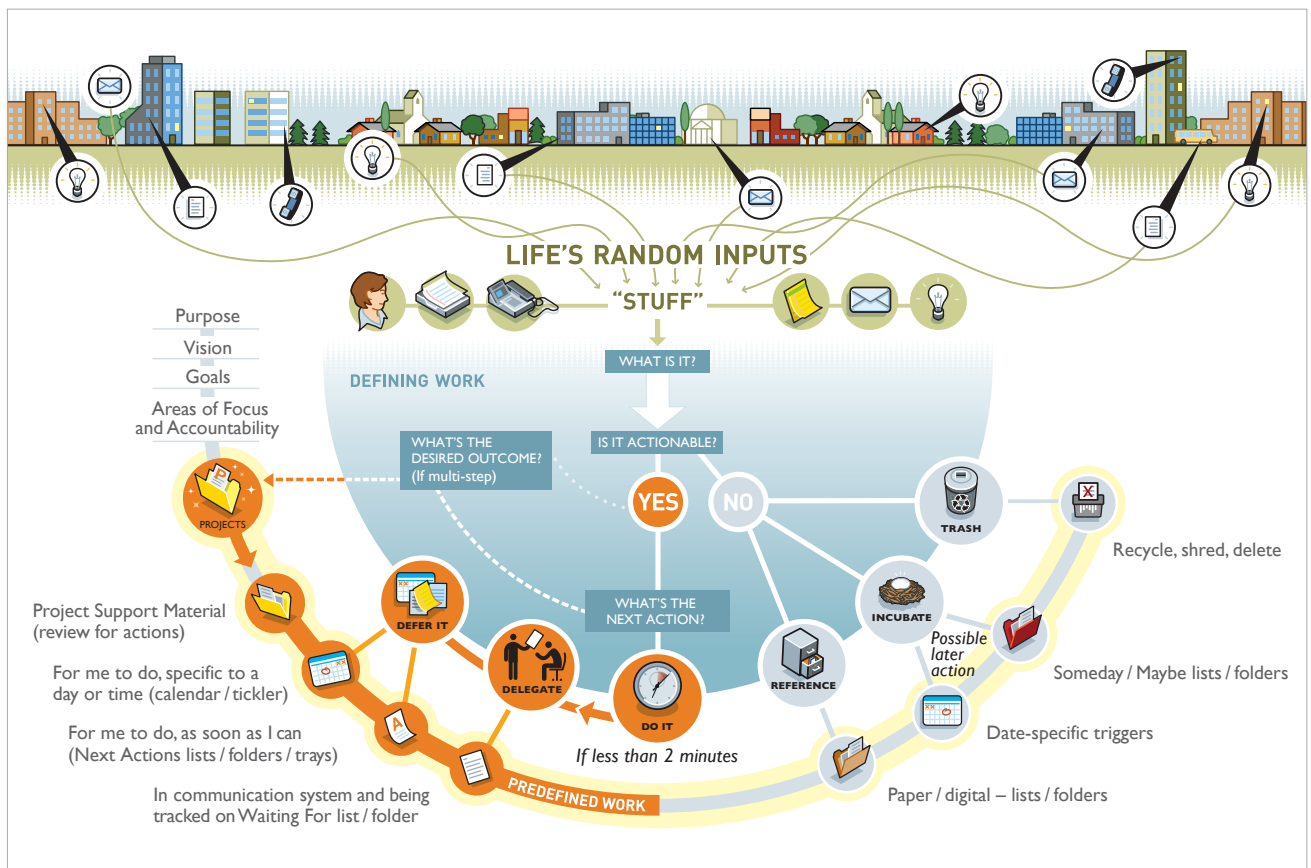
THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:

Read or listen to the book *Getting Things Done* is the essential manual for this methodology (part one is an excellent overview of the whole game).

Take a course The courses offered by our global partners around the world are excellent primers for understanding the key steps of Mastering Workflow.

Practice, practice, practice The GTD Workflow Map (shown below) is a fantastic coaching tool for walking yourself through the core models for capturing, clarifying, organizing, reflecting, and engaging.

THE GTD WORKFLOW MAP



We recommend getting the full Workflow Map, with all of the GTD models, which comes as PDF download. Visit our online store at gettingthingsdone.com/store to learn more.

THE GTD WEEKLY REVIEW[®] CHECKLIST

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. The paper organizer is no exception. Rest assured, the GTD Weekly Review² is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The GTD Weekly Review steps include:

GET CLEAR

Capture Loose Papers and Materials

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

Get “IN” to Zero

Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

Empty Your Head

Put in writing and clarify any uncaptured new projects, action items, waiting for's, someday/maybe's, etc.

GET CURRENT

Review Next Actions Lists

Mark off completed actions. Review for reminders of further action steps to record.

Review Previous Calendar Data

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

Review Upcoming Calendar

Review upcoming calendar events—long and short term. Capture actions triggered.

Review Waiting For List

Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists

Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting for's, etc.

Review Any Relevant Checklists

Use as a trigger for any new actions.

GET CREATIVE

Review Someday/Maybe List

Review for any projects which may now have become active, and transfer to “Projects”. Delete items no longer of interest.

Be Creative & Courageous

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

² See the *Getting Things Done* book or our GTD Methodology Guides for a GTD Weekly Review checklist.

APPLYING GTD TO A PAPER ORGANIZER

USING THE POWER OF A PAPER ORGANIZER FOR YOUR WORKFLOW

CHOOSING THE SUPPLIES FOR A PAPER ORGANIZER

Many paper organizers can be adapted to work as a GTD organizer. Choose a binder you like and choose forms that will allow you the greatest flexibility in how you use the page. It's important to avoid pre-printed forms that include fields, criteria, and extra information you don't need and will be visually distracting for you. Choose blank forms whenever possible and simply label them as we've described in this Guide. We also suggest you get ten tabbed dividers to serve as section breaks, for the ten suggested sections we will describe in detail in this Guide.

We offer an editable PDF organizer, designed for the GTD best practices suggested in this Guide, in our [Online Store](#). It includes GTD forms for your Calendar, Next Actions lists, Projects, Project Support, Focus & Direction, Contacts, and more. You can edit and save our PDF forms to store in their digital format, or print pages as you wish for a physical binder. You don't need our version to build a successful paper organizer, but it's there for you as an option if you're looking for a tool that's ready to go.

However you choose to build your paper organizer, consider our suggestions as a starting point. You may find you don't need all of these sections in a paper format—particularly as some of these might be stored efficiently online for you, such as a calendar. Build what you need and be willing to adapt it along the way when you find your use and needs change.

SETTING UP THE PRIMARY SECTIONS

Though the sections are relatively simple (with no complex structures to constrain you), there is an intelligent “flow” in how the sections function and work together. We suggest you set these up in this order:

1. **Notes/In** – A trusted, portable inbox for capturing notes and ideas to clarify later.
2. **Calendar** – Holds day-specific actions, time-specific actions, and day-specific information.
3. **Next Actions Lists** – Holds all of the next physical, visible action steps to complete—related and not related to current projects.
4. **Agendas** – Holds the reminders for items to discuss with people and in meetings.
5. **Projects** – An inventory of your current outcomes that will take more than one action step to complete.
6. **Project Support** – Holds thoughts, details, plans, future actions, and miscellaneous support materials for your projects.
7. **Someday/Maybe** – Incubates items you might want to do at some point, but have no current commitment to complete.
8. **Focus & Direction** – Stores details about the higher horizons of your life, including life goals, visions, and inspirations.
9. **Reference** – Holds a wide range of non-actionable, simple reference lists and checklists.
10. **Contacts** – Captures information about key contacts you would want to have at hand.

1. NOTES/IN

A trusted, portable inbox for capturing notes and ideas to clarify later.

This kind of section can be used to capture Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly, not know exactly what the next action is yet, but don't want to lose the idea. Or, you have a colleague drop by your office who mentions something about one of your projects that you should look into. Capturing it in the In/Notes section will store the idea until you are ready to fully process it (through the questions on the GTD Workflow Map), to decide what it means and what you want to do about it.

TYPICAL USES WOULD BE:

Voice mails – Better to listen to them once, take notes, and empty voice mail each time you access it.

Meeting notes – Grab anything you might want to do something about. You can also dedicate a separate page here for each meeting, so you can save your “raw” notes for later review if needed.

Random thoughts – It's always good to have plenty of room to capture thoughts and ideas that may have value, but which you don't want or need to decide about at the moment.

Conversations – Have the Notes/In section open, ready to take notes as you're on the phone and when people drop by your desk.

Notes / In	
11/15	Voice Mail - David re: London trip
11/15	Annual reviews?
11/15	Food for party
11/16	Next dental exam?

To make this section work, you'll need to treat it with the same rigor you would your email and paper inboxes—meaning, process the items in this section down to zero on a regular basis.

2. CALENDAR

Your Calendar holds day-specific actions, time-specific actions, and day-specific information.

Your calendar is a critical component in your GTD system for reflecting the action choices that need to be done **on** a specific day versus those that you see on your Next Actions lists, which can be done **by** a specific day, or on **any** day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about “what’s next?”

THE THREE THINGS THAT BELONG ON YOUR CALENDAR

1. Day-specific information – Information you want to know or be reminded of that day, not necessarily something to do. These can be captured in the Actions/Info area of the Calendar.

Examples:

- Things that might disrupt your day (server shut-downs, office moves, etc.)
- External events to be aware of (big events in town, elections, etc.)
- Activities of other significant people of interest to you (family, coworkers, etc.)

2. Day-specific actions – Things that need to happen during the day, but not at a specific time. These are kept in the Actions/Info section for the day.

Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

3. Time-specific actions – Things that need to happen on a specific day and time. These are tracked on the calendar within the appointments area.

Examples:

- Meetings, appointments, time blocked to work on projects

Appointments		Actions/Info
Thursday		Kate's birthday
6		FYI: Wayne's workshop in Dul... 1
8		Call Jose before end of day
9	Check-in meeting with David	Send renewal forms in by today 2
10		
11		
12	Lunch with Todd 3	
1		
2		
3	Budget team meeting	
4		
5		
6		

REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your Calendar for day- and time-specific actions, any chance you get. On a weekly basis, in your GTD Weekly Review, we recommend reviewing your Calendar backward for any “Oh, that reminds me...” items, and forward for any “I need to start prepping for...” items to capture.

3. NEXT ACTIONS LISTS

Your Next Actions lists hold all of the next physical, visible action steps to complete—related and not related to current projects.

This level is known as the Ground level, or “runway” in some GTD references.

This section is used for the lists of the very next actions you need to do, as soon as you have the time do. These include the next steps on projects (“Call Joe for his suggestions about a dentist”) and single actions we need or want to do (“Email Daniel our pictures from Hawaii”). Because most people have dozens of these kinds of “to-dos,” it is easiest to manage them on separate lists, organized by the context required for the action. In other words, if you need to be at your computer to take the action, put the reminder on a “Computer” list. If the action requires going to the hardware store, park that on an “Errands” list.

Sorting by context is not a requirement to make this Next Actions lists section work effectively, but it is our most common suggestion. If you find that they don’t work as well for you, you can always sort your actions into one list called “Next Actions.”

THE MOST COMMON CONTEXTS FOR ACTIONS

- Calls (from any phone)
- Computer (actions that require a computer)
- Office (requires being there)
- Home (requires being at or around your house or apartment)
- Errands (out-and-about)
- Anywhere (can do the action in any location)
- Waiting For (actions others are supposed to be doing, which you care about)

Important: Any actions that absolutely must be done on a specific day (e.g., a call that has to be made sometime on Tuesday) should be tracked on your calendar, not on these action lists. See our notes about use of the Calendar in that section. These Actions lists are essentially reminders of things that need to get done as soon as you can, after you have dealt with the “have-to” actions for today. These lists are not re-written every day—they are simply available to remind you of all the things you need to do, when you have any discretionary time.

EXPLANATION AND EXAMPLES OF THE MOST COMMON CONTEXTS

Anywhere – An action that can be accomplished, without any restriction about where it's done, would go on this list. Notice in the example below that all the next actions on this list start with a verb. That is the recommended best practice for all of your Next Actions so that when it comes time to choosing what to do, you've already done the thinking about what your action is.

ANYWHERE	
	Due Date
Read Making It All Work	
Sketch out ideas for next vacation	
Draft ideas for staff holiday party	Dec 1

Calls – Place reminders of calls you need to make on this list, if they can be made from any phone. If a call requires a specific location instead (like home or office), we recommend putting the reminder on one of those lists instead. If the phone number is not already in your Contacts, then add it to the subject line, so you're ready to go when you're ready to make the call.

CALLS	
	Due Date
Shelley - questions about restructure	
Dentist for next cleaning appointment	Dec 15
Jamie re: meeting in London on the 26th	Nov 24

Computer – If the action requires a computer (e.g., emails to send, documents to edit or draft, spreadsheets to develop, websites to visit, data to review, etc.), add it to this list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, it's still convenient to have this list separate from your Office list of things to do, because you wouldn't need to look at this list when you are looking for non-computer things to do.

COMPUTER	
	Due Date
Email Ted about taking a tour of the property	
Update budget spreadsheet before next board meeting	Nov 28
Reinstall printer software	

Errands – This holds reminders of things that you need to do when you are “out and about” (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one thing to do or get at one of those locations (like the grocery store), create a sticky note for that location and capture those items on that note to take with you.

ERRANDS	
	Due Date
Buy new bicycle helmet	
Drop off suit to tailor	
Buy paint at the hardware store to repaint bedroom wall	

If you are a regular road warrior you might consider having two errands lists—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.

Home – This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard-copy photos, etc.).

HOME	
	Due Date
Clean out old paint cans from the garage to bring to recycling	
Organize old photos by year	
Fix the closet doors in the bedroom	

Office – These are the next actions that require you to be at your office because of the materials or equipment (like your laptop) you need for the call (e.g., calls you have to make from your desk, purging old hard copy files, scanning documents on the office scanner, etc.).

OFFICE	
	Due Date
Shred old training binders	
Read report on emerging trends	
Bring laptop to IT to check sound issues with speakers	Nov 20

Waiting For – This list keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else’s responsibility. It could be something you’ve ordered that hasn’t come yet, something you’ve handed off to your assistant for which you’re waiting on a response, or something your boss is supposed to be finding out before you can move forward on a key project.

WAITING FOR	
	Due Date
Susan - Is the contract approved for the San Francisco venue? - Nov 14	Nov 18
Anne - Approving consultant expenses for marketing plans - Nov 2	
Bookstore - order placed - Nov 1	
Mom's doctor - Call back with recent test results - Nov 3	Nov 5
Accountant - Email back about advice on 2014 deductions - Nov 6	

We suggest adding the date you started waiting in the description of the item. This is not a due date, but simply the date your hand-off occurred. This can be helpful for deciding when it’s time to follow-up again, if you have not had a response. The Waiting For list should be reviewed as necessary (at least once a week in the GTD Weekly Review), triggering appropriate actions on your part to follow up, light a fire, or just check the status.

CUSTOMIZING YOUR CONTEXTS

The lists we have suggested should serve as a starting point. You may need more of these, or fewer. For example, some people find they want to break out Computer into more specific lists, such as a list just for Email. Executive support staff can often use a context called Meetings to Schedule. Some managers find a Projects–Delegated list useful as a high-level Waiting For list. Or, you may find you don’t want to use as many contexts, and a simple list called Next Actions or Next Actions-Work and Next Actions-Personal would suffice for your action lists. Be willing to experiment to find the set of lists that will work best for you.

4. AGENDAS

Agenda lists hold the reminders of items to discuss with people and in meetings.

These lists track the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team. For example, a call you need to make to that person, would go on your “Calls” list. Once you’re on the call, you may refer to the Agenda list for that person, but it’s the Calls list that is triggering the action to make the phone call, not the Agenda list.

Create a separate list for each person/meeting:

AGENDAS FOR: <u>Marketing</u>
Update staff photos on website
New product datasheets
Social media plans for Q1
SEO results

AGENDAS FOR: <u>Mom's Doctor</u>
Current medications
Long-term care
Vitamins she should be taking?

You could easily have half a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

5. PROJECTS

The Projects list summarizes the inventory of your current outcomes that will take more than one action step to complete.

Projects are known as Horizon 1, or the “10,000 level” in some GTD references.

A current and complete Projects list is one of the most important lists to maintain. It gives you a quick snapshot of the commitments on your plate that will be completed within the next 12-18 months. It’s a key driver for your priorities and the choices you make about how you spend your time, attention, and energy. It’s also your safety net to reflect back to you the larger outcomes on your plate, particularly as your next actions will come and go quickly as they are completed. In the GTD Weekly Review, the Projects list serves as a trigger list for ensuring you have a next action captured for each project, to move it toward completion.

This list does not track the next actions for your projects—that’s the job of the Next Actions lists. The Projects list captures your desired outcomes for each of your current projects, whereas Next Actions lists track what you need to do next to reach that outcome. (And Project Support, which we will cover in the next section, stores details, plans, and future actions related to your projects.)

On average, most people tend to have between 20 and 100 current projects on their plate at any given time. You may be surprised to find that you have more projects than you think.

You may want to subdivide your projects on to more than one list (e.g., Work, Personal, Delegated, Job, Kids, Home); or simply keep one complete inventory for easy overview.

Example of Projects Captured on One List

PROJECTS	
	Due Date
Complete 2014 budget	Dec 30
Get GTD up and running	
Roll-out new compensation plan	Jan 10
Take vacation to Tahiti	Feb 14
Hire new receptionist	
Retirement plan in place	

Examples of Projects Subdivided Into Different Lists

PROJECTS - Work	
	Due Date
Complete 2014 budget	Dec 30
Get GTD up and running	
Roll-out new compensation plan	Jan 10
Hire a new receptionist	

PROJECTS - Delegated

	Due Date
Bob - Resolve manufacturing issue with Frankfurt plant	
HR - Upgrade employee time tracking software	
Admin - Book travel for GTD Seminar in New York	Nov 8
Admin - Create a database to track our key partners	
Spouse - Clean out garage	

PROJECTS - Personal

	Due Date
Repaint front of house	
New fence in garden installed	
Take vacation to Tahiti	Feb 14
Son's university applications submitted	Apr 1
Retirement plan in place	

6. PROJECT SUPPORT

Project Support holds thoughts, details, plans, future actions, and miscellaneous support materials for your projects.

Formats for project support can include simple lists, mind maps, sketches, printouts of spreadsheets—you name it.

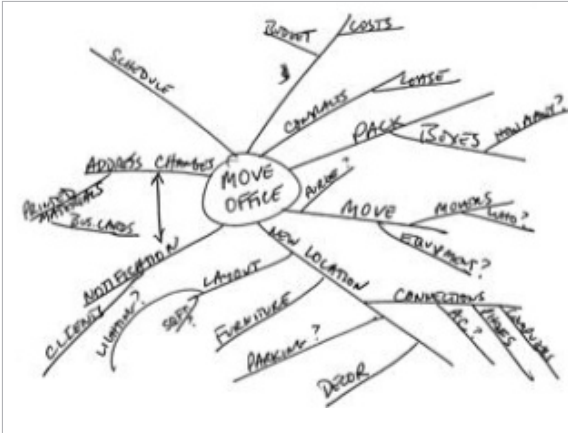
Even if you don't have many ideas yet about a project such as your next vacation, this would be the place to dedicate space to capture any current thinking, as well as providing you a trigger or motivation to regularly focus on the project and develop it further.

Even simple projects, such as "Take Vacation," might utilize a simple page for collecting your hotel ideas, packing notes, items to handle before you go, etc.

Example of a Simple List for Your Project Support

PROJECT: Tahiti Vacation
Pack sunscreen
Tours to take:
- zip line tour
- kayaking
Get housesitter
Hold newspaper and mail while we're gone
David - hotel ideas?
Pack scuba gear

Example of a Mind Map for Project Support



Example of a Classic Project Outline for Your Project Support

Website redesign

- I. Platform
 - Who will build it
 - Migration from existing platform
 - Mobile options
- II. Content
 - Marketing content
 - Video streaming
 - Online classes
 - Community photos
- III. Budget
 - Staging it out to spread costs out over time
 - Using current components
 - Build or buy video player?

Much larger projects could have computer printouts or just additional brainstorming space for reminders and idea-holders. Don't be surprised if you have some projects that have no project support—you just know the project end point and the next actions as they come to you.

You only need to do project planning to the extent that it gets the project off your mind.

While this section won't capture all of your project details, as you will likely also have physical and digital support folders and files for those, it will be useful for quick bulleted lists of notes, milestones, and "future" actions you want to capture.

PROJECT SUPPORT VS. NEXT ACTIONS LISTS

It's important to understand that project support is not the place to go to for reminders about current next actions and waiting for on your projects. Those actions are tracked on those lists for you to be able to quickly scan and choose what to do, when you have time to take action. Those might have once lived in project support when you were brainstorming or capturing future actions, but once they become current next actions, they are added to your Next Actions lists or Calendar. That may seem like repetition, and different from how you might create a list of all of the actions related to that project and only work off of that list, but there is a practical and efficient reason for doing it this way. Imagine you have 20 current projects. That would mean scanning 20 different project support lists/places to look for current actions you can take, given the context you're in. When your current next actions are already captured on Next Actions lists or your Calendar, you can then move fluidly between those places, based on what tools or people are available, and what place you are in that will support you in taking action—otherwise known as “context.” Context will always be your first limitation when you're choosing what to do. For example, if you are near your computer and can handle some computer-related actions, you can go directly to your Next Actions list called Computer and choose from all of the items on that list—across all of your projects. That's not to say you won't be looking for a specific project to work on from your list of choices on your Computer list—it just means sorting your actions by project won't be the primary way your actions are sorted.

If this concept of storing actions on Next Actions lists instead of in Project Support seems foreign, give it some time and practice. It's designed that way to give you the most streamlined and efficient access to be able to get things done. If we suggested you store all of your next actions in your Project Support only, you would no doubt be spending more time digging through Support materials to find your next actions. Burying next actions in Project Support also runs the risk of out of site, out of mind. It's too easy for important items to get lost among the sea of notes, ideas, and future actions.

Later in this Guide, we'll talk about “linking projects to their related actions,” which should relieve any concerns you have about listing next actions away from their related project.

7. SOMEDAY/MAYBE

Incubates items you might want to do at some point, but have no current commitment to complete.

Someday/Maybe items could represent next actions or projects that were current at one time or not. Many people find they triage things onto and off of the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your GTD Weekly Review. That should give you the freedom to capture items onto this list, without the stress of feeling like you've made a commitment you may not have the resources to take on.

They can range from recent projects that now need to be moved to a “back burner” until a more appropriate time (e.g., organize a staff picnic), to more long-range ideas about things you might like to do some time in the future (e.g., learn Italian, climb Mt. Everest, get your M.B.A.). Give yourself permission to capture and review these kinds of creative possibilities, let them incubate, and regularly evaluate them for the possibility of making them active. Most of the really great things you may be doing a few years from now will likely start on this list. You can capture all of your Someday/Maybe items on one list or several lists (work, personal, home, places to travel, etc.).

SOMEDAY/MAYBE	PERSONAL
Write a book	
See the Great Wall of China	
Get a dog	
Take singing lessons	
Learn Italian	
Get MBA	
Change mobile phone service	

SOMEDAY/MAYBE	WORK
Expand into Asian markets	
Partner with Appl	
Bring the team on a trip	
Publish an article in ASTD	
Upgrade office phone system to VoIP	
Upgrade accounting software	

You'll notice that the Someday/Maybe items do not have a due date. You could certainly add the date when you added the item if you like, but we don't suggest adding a due date. Someday/Maybe items are, by their very nature, “someday”— there is no commitment to completing them. Your only commitment to them would be to review these choices regularly in your GTD Weekly Review. Some may eventually become current projects or next actions, and others may drop off when your priorities or interests change.

8. FOCUS & DIRECTION

Stores details about the higher horizons of your life, including life goals, vision, and inspirations.

We suggest this section be used for Horizons 2, 3, 4, and 5, in the Horizons of Focus^{® 3}:

Horizon 5+: Purpose and principles

Horizon 4: Vision

Horizon 3: Goals and objectives

Horizon 2: Areas of focus and accountability

Horizon 1: Projects

Ground: Calendar/Actions

Ground and Horizon 1 do not need to be captured here, as those are already in your Calendar, Next Actions lists, and Projects sections.

The Horizons of Focus describe the six different horizons to use to define your work. These horizons are a useful framework to remind you of the multi-layered nature of your “job” and the resulting commitments or tasks. Defining your purpose and values, vision, goals, and areas of accountability, along with the related projects and next actions, will help you trust your priorities and feel good about the day-to-day actions that you choose to do.

Capturing ideas and notes about these higher levels can be as simple as capturing a list of your areas of focus personally and professionally, a list of your longer-term goals, or a mind map of your vision for your job or personal life. What we’re not suggesting is that you put pressure on yourself to create work for yourself at these higher levels. Start with what most has your attention and what is present now in any of these horizons.

GROUND (CURRENT NEXT ACTIONS AND YOUR CALENDAR, ALSO REFERRED TO AS “RUNWAY”)

This is the ground floor—the huge volume of actions and information you currently have to do and to organize, including emails, calls, memos, errands, stuff to read, stuff to file, things to talk to staff about, etc. If you got no further input in your life, this would likely take you 300-500 hours to finish. Just getting a complete and current inventory of the next actions required at this level is quite a feat.

Review this horizon multiple times daily or whenever you have a question about what to do next.

Ground level items are already captured in the Calendar and Next Actions lists section of your organizer and would not need to be captured here in Focus & Direction.

³ See David Allen’s *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.

HORIZON 1 (CURRENT PROJECTS, ALSO REFERRED TO AS “10,000 FEET/LEVEL”)

This is the inventory of your projects—all the things that you have a commitment to finish, that will take more than one action step to complete. These “open loops” are what create most of your actions. These projects include anything from “look into having a birthday party for Susan” to “buy a new car.” Most people have between 30 and 100 of these. If you were to fully and accurately define this list, it would undoubtedly generate many more and different actions than you currently have identified.

Review this horizon weekly in your GTD Weekly Review, or whenever next action contents are not current.

Projects are already captured in the Projects section of your organizer and would not need to be captured here in Focus & Direction.

HORIZON 2 (YOUR AREAS OF FOCUS AND ACCOUNTABILITY, ALSO REFERRED TO AS “20,000 FEET/LEVEL”)

What’s your job? Driving the creation of a lot of your projects are the four to seven major areas of responsibility that you—at least implicitly by yourself, if not by someone else (e.g., your boss)—are going to be held accountable to have done well, at the end of some time period. With a clear and current evaluation of what those areas of responsibility are, and what you are (and are not) doing about them, there are likely new projects to be created and old ones to be eliminated.

HORIZON 2 – Areas of Focus and Accountability

Work:

- Director of Northwest region
- Marketing oversight
- Community outreach
- Staff development
- Mentoring

HORIZON 2 – Areas of Focus and Accountability

Personal:

- Parent
- Volunteer
- Health & Fitness
- Finances

Review this horizon at performance reviews, monthly personal check-ins, or whenever job or life changes require reassessment of responsibilities.

HORIZON 3 (YOUR ONE-TO-TWO YEAR GOALS AND OBJECTIVES, ALSO REFERRED TO AS “30,000 FEET/LEVEL”)

Where is your job going? What will the role you're in right now look like 12-18 months from now, based on your goals and the direction of the changes at that level? We've met very few people who are doing only what they were hired to do.

These days, job descriptions are moving targets. You may be personally changing what you're doing, given personal goals; and the job itself may need to look different, given the shifting nature of the work at the departmental or divisional level. Getting this level clear always creates some new projects and actions.

HORIZON 3 – Goals and Objectives

Work:

Expand community outreach program to 4 major programs per year
Double customer base in Northwest region

Personal:

Complete a marathon race
Take a writing course
Son enrolled in an excellent university

Review this horizon annually or whenever you need to recalibrate your goals.

HORIZON 4 (YOUR THREE-TO-FIVE+ YEAR VISION, ALSO REFERRED TO AS “40,000 FEET/LEVEL”)

The goals and direction of the larger entity within which you operate heavily influence your job and your professional direction. Where is your company going to be, one to three years from now? How will that affect the scope and scale of your job, your department, and your division? What external factors (like technology) are influencing the changes? How is the definition and relationship with your customers going to change, etc.? Thinking at this level invariably surfaces some projects that need to be defined and new action steps to take to move them forward.

HORIZON 4 – Vision

Work:

The company is known as the leaders in our industry. We are consistently profitable and attracting excellent talent.

Personal:

My family is happy and healthy. We are living debt-free and taking regular vacations. I am expressing my creative talents through writing.

Review this horizon whenever additional clarity, direction, alignment, and motivation are needed.

HORIZON 5 (YOUR PURPOSE AND PRINCIPLES, ALSO REFERRED TO AS YOUR “50,000 FEET/LEVEL”)

What is the work you are here to do on the planet, with your life? This is the ultimate bigger picture discussion. Is this the job you want? Is this the lifestyle you want? Are you operating within the context of your real values, etc.? From an organizational perspective, this is the Purpose and Vision discussion. Why does it exist? No matter how organized you may get, if you are not spending enough time with your family, your health, your spiritual life, etc., you will still have “incompletes” to deal with—make decisions and have projects and actions about—to get completely clear.

HORIZON 5 – Purpose and Principles

Work:

To provide the highest quality products, with excellence and integrity

Personal:

Living a life with love, joy, and learning

Review this horizon whenever additional clarity, direction, alignment, and motivation are needed.

Feel free to get creative with this Focus & Direction section. It should serve to inspire you and give you direction about what you want to focus on in your personal and professional life. If you want more educational support on these horizons, we suggest David Allen’s book *Making It All Work*.

9. REFERENCE

Holds a wide range of non-actionable, simple reference lists and checklists.

This functionality is so totally open-ended and in one sense, so simple, the possibilities are infinite.

Have you ever...

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

To get started, here are some possible new lists or lists within lists to try:

- Checklists (e.g., GTD Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

Examples of Checklists

Inspirational Quotes

Your mind is for having ideas, not holding them. –David Allen

Your ability to generate power is directly proportional to your ability to relax. –David Allen

You need to think about your stuff more than you think, but not as much as your afraid you might. –David Allen

There is usually an inverse relationship between the amount something is on your mind and the amount it is getting done. –David Allen

If you do not pay attention to what has your attention, you will give it more attention than it deserves. –David Allen

Travel Checklist

Passport

iPad charger

Laptop power cord

International power adapters

Umbrella

Foreign currency

Set out of office message on email

Ear plugs

This Reference section is not meant to carry around all of the reference you might need to get things done. In fact, most of your reference information would be in other locations, such as physical filing cabinets and digital storage. If you're not sure what to include, ask yourself, "What's the key reference I would want or need to carry around with me?"

10. CONTACTS

Captures information about key contacts you want to have at hand.

Use this section to capture information about people and places and to record important numbers that you want to have accessible in your paper organizer (versus address books you already likely have in your email and mobile phone address books).

Name / Address	Phone / Email / Additional
David Allen Company	Phone: 805-646-8432
201 E. Ojai Ave #788	customerservice@davidco.com
Ojai, CA 93024	www.gettingthingsdone.com

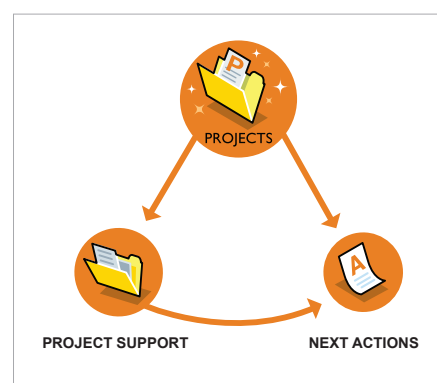
LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data Project Support, and in our experience, it rarely works to have current next actions buried among Project Support for day-to-day action management. Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your Project Support material to find the immediate next actions based on the tools, people, and places available to you in the moment? Probably more repellent than attractive to you, especially if you knew there was still thinking to do from the Project Support.

When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you naturally choose what to do first—by context. Then Project Support remains the parking lot for actions that are incubated for future action. You can always add a keyword for the project in your next action or waiting for description. Just be careful that whatever additional criteria you add for creating new entries does not become a burden or requirement.

Rest assured, the GTD Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, largely based on those project support materials, so you can trust that what you are choosing from your Next Actions lists is current.

In practice, your GTD Weekly Review is the time to review each project to make sure you have a next action captured for that project. Often, that means going back to your Project Support material to review your plans to see what's next.



REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones you set up based on context, such as Calls, Computer, etc.) whenever you get a chance. On a weekly basis, in your GTD Weekly Reviews, we recommend reviewing all of your actionable lists, including Next Actions lists, Waiting For, Someday Maybe, Projects, and relevant Project Support. This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each Project is moving forward. The higher horizons, described in Section 8, are reviewed at varying intervals.

MARKING ITEMS COMPLETE

When you complete something on your lists, you can put a checkmark or X next to the item, strike through it with a line, or highlight it with a pen. When you reach the end of the page, simply create a new page, and carry any remaining items over to the new page.

MAKING PRIORITY DECISIONS

Question: How do I make priority decisions?

David Allen: I have a radical point of view: learn to listen to, and trust, your heart. Or your intuition, or your gut, or the seat of your pants, or whatever part of your anatomy is the source of that mysteriously wonderful “still, small voice” that somehow knows you better than you do, and knows what's better for you, better than you do.

The “ABC” priority codes don't work. Listing your top 10 things you think have to get done, in order, doesn't work. You'll have a different priority set at 8pm than you will at 10:30 this morning. And sometimes the most strategic thing for you to do will be to water your plants. Like, when you've been in six meetings, felt beat up in five of them, and by 4:30 your brain is scrambled eggs, and you barely have the attention span of a gnat. That's the time to water your plants and fill your stapler. Why? Because you can't do anything else, and you're going to have to water your plants sometime anyway.

On a day to day, moment to moment basis, there is no algorithm or formula that will last very long, or is really worth trying to nail down in some written or coded system. The four criteria that you will use to decide what to do are (in order of precedence):

- **Context** – what can I do where I am?
- **Time** – when do I have to do something else?
- **Energy** – how wasted/fresh am I?
- **Priority** – what has the highest payoff for me if I do it?

The idea of “payoff” to yourself is the intuitive one. But let’s not be frivolous—when was the last time you and your professional colleagues as a group took a sincere look into the future and made the hard decisions about what is still mission-critical and what is not? When did you last decide what your job really is? When was the last time you personally sat down and thought through where you are in your life, on all fronts, and where you’re going, and what you really want to be different than the way it is?

Revisit your broader horizons regularly, letting it sink in at all the levels (conscious and otherwise) it might affect. Then get organized and current with your current realities and commitments, so that you have a clear enough deck to listen to the internal directions and hunches, and to follow them without distractions.

Do I process my email? Or call Aunt Susie? Or balance my checkbook? Or plan the next year’s strategy? Or have a beer and hang out with my spouse in the yard? Who knows?

Be open to your own spirit and its directions (you might even consider asking it!)—then take the risk to move on your best guess, pay attention to the results, and course-correct as you keep moving along...

I’ve never found another way to do it.

***You’ve got to think about big things
while you’re doing small things,
so that all the small things go in the
right direction.***

— Alvin Toffle

INTEGRATING EMAIL WITH A PAPER ORGANIZER

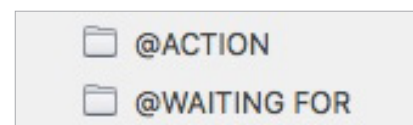
TIPS FOR GETTING YOUR INBOX TO ZERO AND CAPTURING ACTIONABLE REMINDERS

The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox. It takes less psychic effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the GTD Weekly Review). The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in “in” as the safest place.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE: USE THE EMAIL AS THE REMINDER

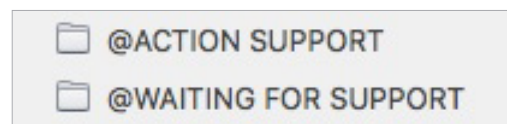
Create @Action and @Waiting For folders in your email program, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in your paper organizer—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and Calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some “re-deciding” about emails you already decided about, if the next action is not apparent by the subject line.

OPTION TWO: USE NEXT ACTIONS LISTS OR YOUR CALENDAR AS THE ACTION REMINDER

Create @Action Support and @Waiting For Support folders in Mail to hold supporting information for actions that are tracked on your Calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action. You would be reminded of the action when you review your Calendar or Next Actions lists. It's one fewer place to look for actions or waiting for items, whereas the first option adds an additional location in which to look for a complete view of your reminders.



People often like this option because all of their reminders are tracked in as few places as possible. But it does mean they have to take the time to go to their Next Actions lists and define the next action.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in this Guide) you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file⁴)?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

Do it now If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For in Tasks.

Defer it If needing to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list.

If multiple actions, what's your desired outcome? Track that outcome on your Projects list in Reminders.

We recommend getting your inboxes to zero daily, or at least once a week in your GTD Weekly Reviews.

⁴ For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

CONCLUSION

FINAL THOUGHTS AND NEXT STEPS

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect[®].

We offer an editable PDF Organizer, designed for the GTD best practices suggested in this Guide, in our [Online Store](#). It includes GTD forms for your Calendar, Next Actions lists, Projects, Project Support, Focus & Direction, Contacts, and more. You can edit and save our PDF forms to store in their digital format, or print pages as you wish for a physical binder. You don't need our version to build a successful paper organizer, but it's there for you as an option if you're looking for a tool that's ready to go.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com