Getting Things Done
by David Allen - 2001

Part I
Chapter 1 - <u>A New Reality</u>

There is an inverse proportion between how much is on your mind and how much is getting done.
1. Capture all the things that need to get done into a logical system outside your head.
2. Make front-end decisions about all the inputs you allow.

Requirements for managing commitments
*   Anything on your mind must be placed in your collection bucket.
*   Clarify exactly what your commitment is and what to do.
*   Keep reminders of actions needed organized for review.

Outcome thinking is one of the most effective means toward accomplishment.

You don't manage time, you manage yourself.

Your short-term memory is like RAM and contains all the incomplete, undecided, unorganized "stuff".

Your conscious mind is a focusing tool - only 2 to 3 things at any one time. It is not a storage place.

Chapter 2 - <u>Five Stages of Mastering Workflow</u>

Workflow analysis is horizontal in nature

1. Collect things that command our attention
2. Process what they mean and what to do about them
3. Organize the results
4. Review as options for what we choose to do
5. Do it

Separate these stages as you move through your day.

Major reason for failure is that you are trying to do multiple - or all - stages at one time.

*   Collection:
    *   All things you consider incomplete in your world; anything you think ought to be different and you have any internal commitment to changing
    *   As soon as you attach a should, need to, or ought to, then that thing becomes an incomplete

    Collection success factors
    i.   Every open loop must be in your collection system and out of your head
    ii. Maintain as few collection buckets as you can
    iii. Empty them regularly

- Process:
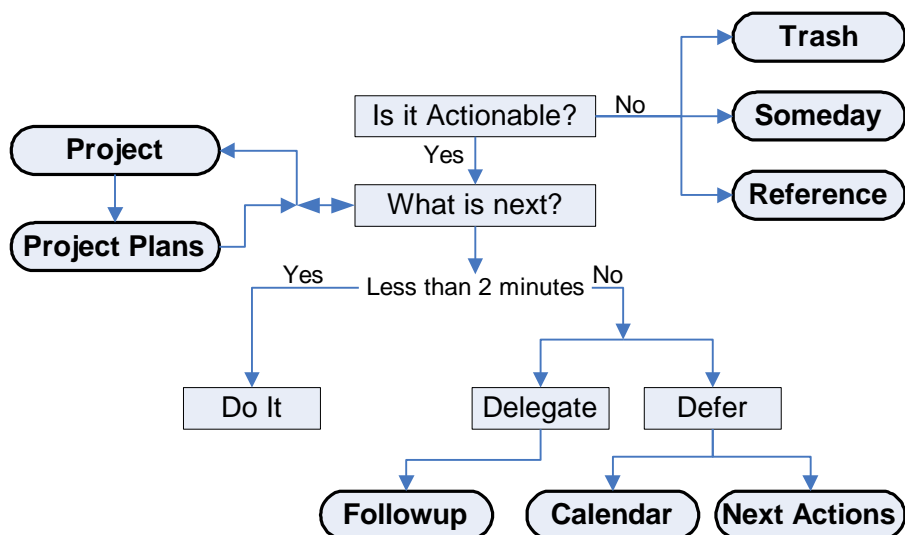
- Organize:
  Project -- any desired result that requires more than one action step. You don't do a project, only action steps.

- Review:
  1. Calendar
  2. Next Actions
  3. Projects
  4. Follow up
  5. Someday/Maybe (tickler file)

  At least one Weekly Review is required
    - Gather & process all "stuff"
    - Review system
    - Update lists
    - Get clean, clear, current, complete

- Do: an intuitive decision
  Migrate from hoping the decision is the right thing to trusting that it is correct

Action Choice Models for decision making (see Chapter 9 for use)
- The four-choice criteria model for choosing actions in the moment
  1) Context: Can you do it anywhere, or just at one location?
  2) Time Available: When do you have to do something else?
  3) Energy Available: How much energy do you have vs. need?
  4) Priority: What action will give you the highest payoff?
- The threefold model for evaluating daily work
  1) Doing predefined work: Next Actions list
  2) Doing work as it shows up
  3) Defining your work: Going through "In" basket and breaking out actionable steps
- The six-level model for reviewing your own work
  1) Runway -- current actions: All actions you need to take
  2) 10,000ft -- current projects: Creating action steps for projects
  3) 20,000ft -- areas of responsibility: Listing and Reviewing
  4) 30,000ft -- one or two year goals: What you want your life to be like in 1 to 2 years
  5) 40,000ft -- three to five year goals: Longer term goals
  6) 50,000ft -- life: Big picture view of your life

Chapter 3 - <u>Five Phases of Project Planning</u>

The natural planning model - project planning is vertical in nature

1. Defining purpose and principles: Why are we doing this?
2. Outcome visioning
3. Brainstorming
4. Organizing
5. Identifying next actions

If we need more to happen then start at 1 and work toward 5. If we need more clarity then start at 5 and work toward 1.

<u>Purpose</u>
The value of asking **Why**
*   It defines success
*   It creates decision-making criteria
*   It aligns resources
*   It motivates
*   It clarifies focus
*   It expands options

<u>Principles</u>
What policies, stated or unstated, apply to the group's activities?

While purpose provides juice and direction, principles define the parameters of action and the criteria for excellent behavior.

<u>Vision / Outcome</u>
Vision is the **What**
Purpose and principle furnish impetus and monitoring, but vision provides the blueprint to act on.

Visioning promotes focus and when we focus on something our minds filter out other things extraneous to our goal. We notice that which we are focusing on; called reticular formation. An example of this in our everyday life is the tendency to not see or hear that which we don't believe in.

When we envision ourselves doing or accomplishing something, we see ourselves doing it at that time, but not before.

Developing a vision
1. View the project from beyond the completion date.
2. Envision "wild success" and suspend your 'but'.
3. Capture features, aspects, qualities you imagine in place.

<u>Brainstorming</u>
This is the **How** part of thinking

Mind Mapping: The core idea is placed in the center and associated ideas grow out, in a free form fashion, around the core.

Brainstorming not only captures ideas, but generates new ones.
*   Don't judge, challenge, evaluate, or criticize
*   Go for quantity, not quality
*   Put analysis and organization in the background

<u>Organizing</u>
Once you get all your ideas out of your head and in front of your eyes, you will see natural relationships and structure.
This is where project management software is useful to…
- Identify the significant pieces
- Sort information by
  i. components
  ii. sequences
  iii. priorities
- Detail to the degree you require

<u>Next Actions</u>
Allocation of resources to accomplish the result

Creating a list of real projects and managing your next action is 90% of project planning

At some point in an actionable project you must define the next action
- Decide on the next action for each of the current moving parts.
- Decide on the next action in the planning process, if necessary

How much planning do you need to do? -- as much as needed to get the project off your mind.
- 80% of projects can be planned in your head
- 15% of projects may require brainstorming
- 5% of projects may need deliberate application of one or more of the five phases of the natural planning model

Part II
Chapter 4 - <u>Getting Started: Setting Up the Time, Space, and Tools</u>

These are mostly tricks to help you do what you are supposed to do.

Set aside the time (2 days, back-to-back, to gather your "stuff"

Set up the space -- writing surface, in basket, phone, computer, file drawers

Get the tools
- Use and alpha system for files
- get rid of hanging files
  - If you can't, label only the folders
  - only one folder per hanger
- purge files at least yearly

Chapter 5 - <u>Collection: Corralling Your "Stuff"</u>

Go through every storage area in your life

Why you gather everything before you process
- It is helpful to know the volume
- It lets you know the endpoint
- When processing and organizing, having unknown "stuff" is distracting, reducing your focus and control

What shouldn't go into the "In" box
- Supplies
- Reference material
- Decoration
- Equipment

Chapter 6 - Processing: Getting "in" to Empty

When finished, you will have…
1. Trashed what you don't need
2. Completed any "less than 2 minute" actions
3. Handed off any delegation
4. Sorted into your own organizing system, reminders of action
5. Identified larger commitments (projects) based on input

Basic rules for processing
- Process the top item first
- Process one item at a time
- Never put anything back into the "In" box

After your system is running, you may find that processing using the LIFO method is best, from a memory and memory clearing standpoint.

What do you do if there is no action required?
- Trash
- Someday/Tickler file
- Reference material

Each Next Action needs to be a physical thing.

Projects are a 'stake in the ground' to remind you of actions pending for those things that require more than one action.

Chapter 7 - Organizing: Setting Up the Right Buckets

There are seven types of things to track and/or manage
1. Projects list
2. Project support material
3. Calendared actions and information
4. Next Actions lists
5. Follow up list (delegated)
6. Reference material
7. Someday/Maybe list (tickler file)

Hard edges: Keep categories separate and distinct -- i.e. a possible future project goes into Someday/Maybe file

Once processed, all you need is lists and folders for reference and support material

List definition: A grouping of items with some similar characteristics.

Do not create external structuring of priorities on your lists -- the list is just a way to keep track of your total inventory and you will intuitively prioritize the list as you look at it.

Actions come in two flavors:
1. Must be done on a certain day or time (Calendar)
2. To be done as soon as you can get to them (Next Action)
   - Should be grouped by context (at computer, errands, call/contact, around house, meetings/agendas, read/review)

Non actionable data
1. Reference material categories
   - General: paper and email
   - Large volume category
   - Contact managers
   - Libraries and archives
2. Someday/Maybe (tickler file)
   - Actually make the list yourself
   - Make an inventory of creative imaginings
   - Create special categories for special interests
   - Do not create Hold/Review files -- solve the problem when categorizing
3. Calendars
   - Park reminders of what you want to consider in the future
   - Events you might want to participate in
   - Decision triggers
4. Tickler file -- 43 folders are needed
   - 31 files for days-of-the-month
   - 12 files for months-in-the-year
5. Checklists are creative reminders that you should create and eliminate as required

Chapter 8 - Reviewing: Keeping Your System Functional

Two major issues…
1. What do you **look at** and when?
2. What do you need to **need to do** and how often (to insure it is still working)?

- Look at calendars first because it is what is required for this day/time
- Then look at action lists (calls, computer, etc.)

The magic key to the sustainability of the process is the **Weekly Review** -- Whatever you need to do to get your head empty again: Go through the Five Phases of Workflow Management until you know what you are not doing and are happy with it.
- Get loose "stuff" into your "In" basket
- Process notes
- Review notes
- Review previous calendar data for follow up
- Review upcoming calendar for decisions
- write down new ideas in you head
- Review projects
- Review Next Action lists, Follow Up/Waiting For lists, relevant Checklists
- Review Someday/Maybe list
- Review "pending" and support files
- Are there new ideas you can add to the system?

Chapter 9 - <u>Doing: Making the Best Action Choice</u>

Frameworks for deciding actions were covered in Chapter 2…

The four criteria model for evaluating action in the moment
1. Context -- If you can't do the action because you are not in the appropriate location or have the appropriate tools, then don't worry about the action.
   - This is the reason for sorting your list by physical context, i.e. you can't do things that require you to be at home if you are not at home.
   - Structure you list categories early on in your system implementation.
2. Time Available -- Don't take on a two hour task if you have only 15 minutes.
3. Energy Available -- Keep a list of things requiring a low energy state so you can turn to these items when you are in a low energy state.
4. Priority -- Out of my remaining options, what is the most important?

The threefold model for evaluating daily work
1. Doing predefined work: Next Actions list
2. Doing work as it shows up
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The six-level model for reviewing your own work
1. Runway -- current actions: All actions you need to take
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Chapter 10 - <u>Getting Projects Under Control</u>

Which projects should you be planning?
1. Those that still have your attention after you have determined their Next Actions.
2. Those whose potentially useful ideas and supportive detail just show up.

Give yourself the time (1-3 hours) to handle vertical thinking about each project - thinking the project through from now to the end, not just Next Actions.

The key is to get comfortable with having and using your ideas.

Focus your energy constructively on intended outcomes (visioning) and open loops (those things not yet completed).

Chapter 11 - <u>The Power of the Collection Habit</u>

Capturing placeholders for anything that is incomplete or unprocessed in your life enhances your mental well-being and improves the quality of your communications and relationships, both personally and professionally.

Negative feelings come about because you have broken agreements with yourself and others to get things done.

You can prevent broken agreements with yourself by...
- Don't make the agreement -- Make fewer agreements with yourself and others when you know your workload (sort of like knowing the balance and limit of your credit card when shopping).
- Complete the agreement -- You feel good when you finish things, but your boss will just request more tasks, so...
- Renegotiate the agreement -- When you know all you have to do, it is easier to renegotiate with yourself and others.

Our psyche doesn't know the difference between different agreements. If you have more than one active agreement at any moment, then your psyche considers all agreements you are not currently working on (you can only work on one at a time) to be broken.

The reason to collect everything is not that everything is equally important; it is that it's not. Incompletions, uncollected and not renegotiated, take on a dull sameness in the pressure and attention they tie up.

When will you know how much you have left to collect in your head? Only when there is nothing left.

If your mind is focusing on only one thing at a time, without distraction, you will be in your zone.

Use your mind to think about things, rather than think of things. Add value to what you are thinking about, rather than reminding yourself than they exist.

Bailing water in a leaky boat diverts energy from rowing. This doesn't have anything to do with where you are going; only how efficiently you are getting there.

Chapter 12 - The Power of the Next Action Decision

We need to make Next Action decisions when things show up, not when they blowup.

Once the Next Action decision is made (Do It, Delegate It, or Defer It) then it is either complete or placed in one of the eight categories of our workflow diagram.
Why bright people procrastinate so often
- Our nervous system can't tell the difference between a well-imagined thought and reality (Psycocybernetics by Dr. Maxwell Maltz).
  "I am an old man and have known a great many troubles, but most of them never happened" (Mark Twain).
- Bright people often can imagine more issues and problems; therefore, they are more hesitant about moving forward.
- If alcohol is a depressant, then why do people's energy levels often initially go up when they start drinking? The alcohol is depressing the negative self-talk and negative visions.
One way to fall of the wagon of Getting Things Done is to let Next Action lists morph
  into lists of tasks or subprojects, instead of remaining discrete Next Actions. Now things are harder for your mind to deal with.

Next Action values --
- **Clarity:** Before a meeting ends there must be a discussion and conclusion about what the Next Action is.
- **Accountability:** In addition to the Next Action discussion, who is responsible for that action must be determined.
- **Productivity:** Clarity and accountability produce more results with less effort; the definition of increased productivity. Even large and future projects must have Next Actions defined so they can be worked on as necessary/possible.
- **Empowerment:** When focus is increased by clarity and accountability, your ability to make things happen goes up, raising your self-esteem.

Chapter 13 - <u>The Power of Outcome Focusing</u>

There are only two problems in life (Steven Snyder)
1. You know what you want, but don't know how to get it.
2. You don't know what you want.

The only solutions:
- Make it up
- Make it happen

Brainstorming about almost every aspect of your life on a regular basis is life transforming.

Key meeting questions --
- Why are we doing this?
- What will it look like when it's done successfully (visioning)?

Empowerment moves people from complaining victims to outcome action individuals.