



JUNE 2019 REPORT » by Chad Dudley

GETTING THINGS DONE

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PART ONE: THE ART OF GETTING THINGS DONE 1: A NEW PRACTICE FOR A NEW REALITY

- “Anxiety is caused by a lack of control, organization, preparation, and action.” -David Kekich
- Summary of the system:
 - There are two key objectives
 - #1: Capturing all the things that need to get done in a trusted system that is not in your head.
 - #2: Disciplining yourself to make front end decisions about all the “inputs” you let into your life so that we always have a plan for “next actions”
- Major issue: Work has gone from physical work to knowledge work. That means that what needs to be done is less evident. Not something that needs to be assembled or completed. No “edges” to our projects, not clear where they start or stop.
 - Almost every project could be done better and consume an infinite amount of time.
 - No “edges” means that there is no clear indicator of what a “win” is.
 - Your ability to generate “work energy”, energy to do work, is directly proportionate to your ability to relax and know that you are working on what is important, and almost as critical—what you are not working on is going to be ok.
- Most of the stress that people experience comes from inappropriately managed commitments that they make or accept. In order to get over this, you need to control the “open loops” in your life.
- Managing Commitments
 - #1: If it's all on your mind, your mind isn't clear. Collect it somewhere else! Carry your notepad around so it doesn't reside in your mind.
 - #2: Get clarity on your commitment. You must have clarity on what you are committed to and decide what you have to do if anything to make progress toward fulfilling it.
 - #3: Remind yourself. Once you have decided on actions you need to take, keep reminders of them organized in a system you review regularly.

Exercise

- Write down the project or situation that is most in your mind at this moment. What bugs or distracts you the most?
- Describe in a single sentence (in writing), what is a successful outcome of this situation. What would allow you to check this project off as done?
- Write down the next physical action required to move the situation forward. (Should feel some relief, some motivation, and some control over this situation.)

- The issue with “Knowledge Work”
 - You have to think about your stuff more than you realize, but not as much as you’re afraid you might.
 - “In knowledge work...the task is not given; it has to be determined. What are the expected results from the work? This is the key question in making knowledge workers productive. (Peter Drucker)
 - The problem is that “outcome thinking” doesn’t feel like work. But the truth is that it is one of the most important parts of knowledge work.
- Why things stress you out.
 - You haven’t clarified the intended outcome
 - you haven’t decided what the very next physical action step is; and/or
 - you haven’t put reminders of the outcome and the action required in a system you trust.
 - “This constant, unproductive preoccupation with all the things we have to do is the single largest consumer of time and energy.” Kerry Gleason
- The problem with “Stuff”
 - Stuff is anything you have allowed into your psychological or physical world that doesn’t belong where it is, but for which you haven’t yet determined the desired outcome and the next action step. As long as it is still “stuff” it is not controllable.
 - Many to do lists are just lists of stuff, not inventories of the resultant real work that needs to be done.
 - The goal—clear mind, but giving all the stuff a home.
 - Lack of time is rarely the core problem. The real problem is lack of clarity and definition about what a project really is, and what the associated next action steps are.
- Concept of Horizontal and Vertical Action Management
 - Horizontal control maintains coherence across all the activities in which you are involved. Scanning the horizon of all the things that you need to do. Get gas, call that person back, run by drug store, etc.
 - Vertical control manages thinking up and down the track of individual topics and projects. Project planning in the broad sense. Focusing on a single event (vacation,

- project, presentation) and listing all the steps that need to occur to get that event to the finish line.
- Must control commitments and projects along both spectrums.
- The Major Challenge: Getting it All Out of Your Head!
 - Your brain has RAM. Don't take it up with background nonsense that reduces your attention and capacity to deal with present stuff. Constantly distracted and overloaded.
 - Typically an inverse relationship between how much something is on your mind and how much it's getting done.
 - No reason to ever have the same thought twice unless you like having that thought.
 - Your mind likes to remind you of things when you can't do anything about them. Got to get it out of there and give it a home.

2: GETTING CONTROL OF YOUR LIFE. THE FIVE STAGES OF MASTERING WORKFLOW

- The Five Stages of Getting Things Done
 - #1: Collecting. Collect Things
 - Most people have major leaks in the collection process.
 - Many people try all 5 phases at the same time.
 - Collect everything! Capture all "incompletes". Anytime something becomes a "should do", it should be captured.
 - Tools. The fewer the better, the goal is to get it out of your head. Empty them regularly.
 - Email
 - In basket
 - Paper/Pad
 - Electronic
 - Better if you can funnel everything to a central location...email, google doc, something where it all ends up.
 - How do you know it is working?
 - Everything is in the system and out of your head.
 - You have as few collection buckets as you can get away with.
 - You empty those buckets regularly.
 - #2: Processing. Process what they mean and what to do about them
 - Should be two questions.
 - #1: What is it?
 - #2: Is it actionable?
 - No
 - Trash

- Parking Lot. No action needed now, but something that needs to be done later. (Parking Lot/Incubate)
 - Reference. Potentially useful in the future as reference (Reference)
 - Yes
 - What project have you committed to?
 - What is the next action required?
 - Do it. Less than two minutes to do?
 - Delegate it. Is there someone else that this should go to?
 - Defer it. Will take longer than two minutes, you are the person to do it, so you will find a time to do it on your calendar. The calendar should be sacred ground. If it goes on there, you make it happen.
- #3: Organize. Organize the results
 - Projects. Any desired result that requires more than one action step. You don't do a project, only action steps related to the project.
 - Project Support Material. Should have easy access to it.
 - Clarity on what the next action step is.
 - Clear timeline on calendar or tickler system to focus action.
- #4: The Review. Review as options for what we choose to do
 - The Weekly Review. Extremely important to line out and organize what you need to get done each week.
 - Gather and process all your stuff. Review your systems. Update your lists. Get clean, current and complete.
 - Do
 - Criteria
 - Context: Where you are? Can't buy batteries when you are at work.
 - Time available.
 - Energy available.
 - Priority.
 - Evaluating Daily Work
 - Predefined work
 - Doing work as it shows up
 - Defining your work. Cleaning up your in basket, your email, your vm, and your meeting notes.
 - Reviewing Your Work
 - 50,000 ft. (Life)
 - 40,000 ft. (3-5 year plan)
 - 30,000 ft. (1-2 year goals)

- 20,000 ft. (Areas of responsibility). Usually 10-15 categories. Your job description/scorecard.
- 10,000 ft. (current projects). Relatively short term outcomes.
- Runway (current actions). All the calls you need to make, the emails to respond to, the errands to run.

3: GETTING PROJECTS CREATIVELY UNDER WAY. THE FIVE PHASES OF PROJECT PLANNING

- Key Ingredients of Relaxed Control
 - #1: Clearly defined outcomes (projects) and next actions to move towards closure.
 - #2: Reminders placed in a trusted system that is reviewed regularly.
- Enhancing “Vertical” Focus
 - Zero in and go deeper on details of a project. Not scanning the horizon of stuff you have to do.
- The Natural Planning Model
 - You plan naturally, when you go eat, pick a place to go to dinner, go on a trip, etc.
 - Your mind goes through five steps.
 - Defining purpose and principles
 - Outcome visioning
 - Brainstorming
 - Organizing
 - Identifying next actions
 - Many people don’t go through these steps for work, even though they are naturally done in other situations.
- The Unnatural Model
 - “Who has a good idea for this?”
 - Starts the process way down the line.
 - Need to start at the beginning and define a win, a purpose, principles. What is the outcome we want?
- Reactive Planning Model
 - “Let’s get organized”
 - Start something, run into issues. Then decide to get it organized.
- The Five Phases of Natural Planning Techniques
 - #1: Defining purposes and principles
 - Why are we doing what we are doing? Define success, how much you are willing to allocate to get this right.
 - Frustrating if you don’t know what a “win” is.
 - Principles are the “rules” of how you are going to play the game. What guidelines will you follow?

- Aligns resources
 - Motivates people.
 - Clarifies focus.
 - Expands options. Not married to method, only outcome.
 - Principles. How you are going to go about this.
- #2: Outcome visioning
 - Our brains want to know where we are trying to go and then figure out how to get there.
 - View the project in terms of wild success.
 - Capture features, aspects and qualities that you see in place.
 - Our brain works in strange ways. Works in the background to get us to a clear vision.
 - Forces you to clarify outcomes.
 - What does wild success look like? Feel like? What is in place? What has happened?
- #3: Brainstorming
 - Don't judge. Go for quantity, not quality. Just get ideas out on the table.
 - Mind Mapping.
 - Track where the discussion goes.
 - See where it takes us
 - Need some "cognitive tools" to keep people focused. Paper, pen, document up, whiteboard (that is why they are so popular). Left to our own thoughts without these, our minds will wander.
- #4: Organizing
 - Bullet points of what must happen first.
 - Almost a step by step story of how it would play out and see what it looks like. Use it to follow the trail of an idea from the brainstorming session that you liked.
- #5: Identifying next actions
 - Pick all the things that can be done in phase I. That means it doesn't need another action completed before it is started.
 - If the project is still on your mind, there is more planning to do.
 - "Plans get you into things, but you've got to work your way out." Will Rogers

PART II: PRACTICING STRESS-FREE PRODUCTIVITY

4: GETTING STARTED. SETTING UP THE TIME, SPACE AND TOOLS

- Implementation. It's a lot about tricks.
 - Look at your calendar for the next 14 days. It will probably prompt a lot of "yes, I need to do that."

- By doing that (takes 5-10 minutes), you made yourself more efficient for those appointments.
- Get your stuff straight over the weekend, not during the workday when you have a million things flying your way.
- Prep for success. If you have trouble getting to morning workout, get shoes out, get stuff out, reduce the “friction” for you to make that appointment.
- Setting aside the time.
 - Dedicate two days to the process of getting organized.
 - Physical space
 - Have office
 - Home office
 - Don’t underestimate the importance. Need space at home to stay organized.
 - Office in transit
 - If you travel a lot, need a bag or system that still keeps you organized.
 - Watch out when sharing space.
 - Need to keep your systems separate.
 - Tools
 - Labeler is big! Keep things organized.
 - Filing system.
 - Should be able to find everything you need in less than a minute.
 - Any time you find yourself looking for something for more than a minute, even 15 seconds, think about improving your filing system.
 - Hanging file folders are a mess. Avoid them.
 - If it takes longer than 60 seconds to file something, you don't file, you will stack.
 - Purge your files at least once a year.
 - Have a “Dumpster Day”, day to throw out and clean up your office.
 - Purge the crap.

5: COLLECTION. CORRALLING ALL YOUR “STUFF”

- The process...
 - Go track down all your stuff that you have to keep track of. Wherever it may be. Car, office, boat, house, etc. Get it all in one spot.
- Ready, set...
 - All in one place helps because...
 - Get a sense of the volume you have to deal with...
 - Let’s you know where the end of the tunnel is...

- Want to stay focused and not worry about other stacks of stuff you have to get to.
 - ...Go!
 - Train yourself to notice and collect anything that doesn't belong where it is forever.
 - What stays where it is
 - Supplies
 - Reference Material
 - Decoration
 - Equipment
 - Don't chase rabbit trails by trying to purge and organize in this phase. Just get it all in one place first!
 - Sequence
 - #1: Start with your desktop.
 - #2: Desk drawers
 - #3: Countertops
 - #4: Inside the cabinets
 - #5: Floors, walls, and shelves
 - #6: Equipment, furniture, and fixtures
 - #7: Mental mind-sweep
 - Get all the stuff in your head, on your mind, and get it down on paper.
 - Projects started, not completed.
 - Projects that need to be started.
 - Commitments/promises to others still pending.
 - Communications to make/get
 - Work product to create/get out
 - Meetings that you need to set
 - Decisions to communicate
 - Planning session

6: PROCESSING. GETTING "IN" TO EMPTY

- When you finished processing "in", you will have:
 - #1: Trashed all that you don't need.
 - #2: Completed all actions that required less than 2 minutes.
 - #3: Delegated what you can
 - #4: Sorted your own organizing system reminders of actions that require more than two minutes
 - #5: Identified any larger commitments or projects that you now have.
- Process doesn't mean spend time on!
- Key processing question..."What's the next action?"

- What if there is no action?
 - Trash
 - Parking Lot
 - Reference Material
- Once you decide to do something, you have three choices.
 - Do it
 - Delegate it
 - Defer it (work on it later)

7: ORGANIZING. SETTING UP THE RIGHT BUCKETS

- The 7 Things You Want to Organize
 - #1: Projects list.
 - #2: Project support material
 - #3: Calendered actions and information.
 - #4: Next actions lists
 - #5: A “waiting for” list
 - #6: Reference material
 - #7: A “someday/maybe” list
- Each category should be separate and distinct. Each category is an agreement we keep with ourselves.
- Two basic kinds of actions:
 - #1: Those that must be done on a certain day/particular time
 - #2: Those that need to be done as soon as you can get to them.
- Action Reminders
 - Triggers that remind you to do something when you are in a position to do it.
 - Most common categories
 - Calls to make
 - At computer
 - Errands
 - Office Actions
 - At home
 - Agendas
 - Read/Review
- Create reminders of “what you are waiting for...” Things that are keeping your from action in a particular area.
- Have a spot to keep your checklists.
 - Huge timesavers.
 - Think of things you do over and over and need to be reminded of. (Things to always check before you go on a trip.)

8: REVIEWING. KEEPING YOUR SYSTEM FUNCTIONAL

- For your brain to relax, you need to be sure that you are doing what you need to be doing and that its ok to be not doing what you are not doing.
 - Have to trust the system.
 - Once your list of calls to make doesn't contain all calls you need to make, your brain gets stressed and won't trust the system.
- How long should "review" take?
 - As long as it takes to make you feel comfortable that you have everything covered. Could be a few seconds or a few hours.
- Sequence
 - #1: Review calendar.
 - #2: Review your action lists.
- The biggest thing that keeps much of this together? The Weekly Review.
 - What is it? It is whatever you need to do in order to get your head empty again.
- The Weekly Review (fridays or weekend)
 - Loose papers
 - Pull together all the crap.
 - Get it on one place (collection)
 - Process your notes
 - Journal entries, memos, etc.
 - Previous calendar data
 - Review action items.
 - upcoming calendar
 - What do you have to do for upcoming items?
 - empty your head
 - review projects
 - review next actions
 - review relevant checklists
 - Basecamp?
- Weekly review, great to do it on Friday afternoon, Saturday, or Sunday. Anytime before monday am.
 - Adapt to your job, style, situation.
 - Look at your bigger picture.
 - Career goals.
 - Personal goals.
 - Life goals.
 - Doesn't have to be long, but worth looking at.
 - Take time for big picture planning. Goals 1 year, 2 year, 3 years out.

9: DOING. MAKING THE BEST ACTION CHOICES

- The 4 Criteria for Choosing Actions in the Moment
 - #1: Context
 - What can you possibly do, where you are, with the tools you have?
 - Can organize action reminders by context. At office, at home, at grocery store
 - #2: Time available.
 - How much time do you have?
 - That will govern what you can take on.
 - #3: Energy available.
 - Do you have the energy/attention to take something on?
 - #4: Priority
 - What is the most important thing to get done?
- Type of work that you are doing at any given moment
 - Doing predefined work.
 - Planned to do that work at that time.
 - Doing work as it shows up.
 - Reactive
 - Defining your work
 - Deciding what to work on.
- Always be aware of the type of work that you are doing and ask are you doing this type by choice?
- The Six Level Model for Reviewing Your Own Work
 - Life
 - 3-5 Year visions
 - 1-2 Year Goals
 - Areas of responsibility
 - Current projects
 - Current actions
- Go through these categories and find any open loops or incompletions that are nagging at you.
- Clear the decks at the bottom first, then work your way up.
- Process
 - #1: Current actions
 - Make sure action lists are complete.
 - Take an inventory of all current pending actions.
 - #2: Review projects list.
 - All the things that you want/need to accomplish to be the person that you want to be at work and in your personal life.
 - #3: Areas of responsibility
 - What are your areas of focus/responsibility.

- If you are not totally sure what your responsibilities are in each area of your world, it will feel overwhelming.
- #4: 1-2 Year Goals
 - Where do you want to be one year from now? 3 years from now?
- #5: 3-5 Year Vision
- #6: Life

10: GETTING PROJECTS UNDER CONTROL

- The Need for More Informal Planning
 - We can all do more planning. About our projects and our lives. It would take a lot of pressure off of us.
- Typical Planning Steps
 - Brainstorming
 - Organizing
 - Gathering prior notes.
 - Setting up meetings
 - Get info from people that are involved.
 - Gathering information
- Jot down the projects that you are responsible for right now.
 - Focus on them, one at a time.

PART III: THE POWER OF KEY PRINCIPLES

11: THE POWER OF THE COLLECTION HABIT

- The sense of anxiety and grief is not from having too much to do. It is from the feeling that you are breaking agreements with yourself.
- How do you prevent breaking agreements with yourself?
 - Don't make the agreement
 - Say "no" to more things.
 - Don't say "let's get lunch" if you have no intention of getting lunch.
 - Complete the agreement
 - Just finish it.
 - Renegotiate the agreement
 - Go and redo the agreement where you can.
- "Cleaning your garage"
 - You know it should be clean. You have a few choices.
 - #1: Lower your standards.
 - #2: Live up to your standards.
 - #3: Make a plan/parking lot to live up to your standards.

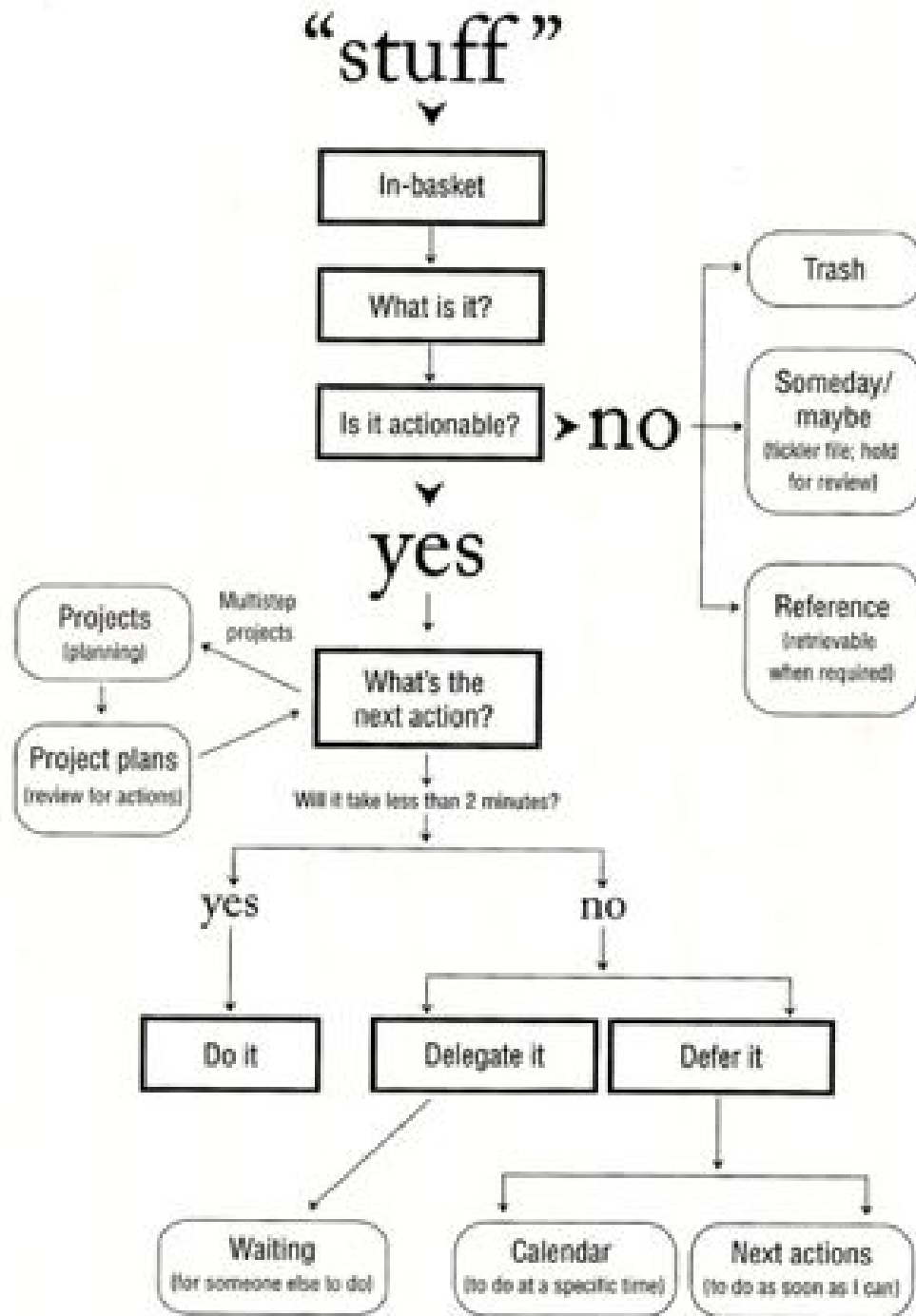
- Collect everything that weighs on your mind!
 - It takes up “Mental RAM”. Wears you out.
 - Get it out of your head!
 - Get your organization to have the collection habit!
- Have to adapt up...
 - If your boss needs you to email stuff, then you email stuff, don't text.
 - However, with colleagues and coworkers, need to be flexible. Shouldn't have to adapt. Everything should get caught in the system.
 - The organization should pursue the 100% collection standard.

12: THE POWER OF THE NEXT ACTION DECISION

- Review “next actions” at the end of each discussion and meeting!
 - Boil it down to the true next action.
 - Car needs repair...
 - Next action isn't taking it in to get repaired.
 - It is getting the number for the repair shop.
- In meetings, don't wait till the end to ask what the action items are.
 - 20 minutes before end of scheduled meeting, start to wrap up and ask what the action items are. Get clarity.
 - Each person needs to get those action items into their own system.

13: THE POWER OF OUTCOME FOCUSING

- The two main problems in life:
 - #1: You know what you want, and you don't know how to get it; and/or
 - #2: You don't know what you want
- If this is true, then we have two solutions:
 - #1: Make it up
 - #2: Make it happen



WORKFLOW DIAGRAM—PROCESSING