Getting Things Done
By David Allen

Mind Like Water = throw a pebble into a still pond and the water will respond totally and appropriately to the force and mass of the input; then returns to calm. It does not over or under react. In fact, it does not react at all. It interacts with whatever comes to it and then returns to its normal state. So you need to give things the attention and reaction they deserve, and nothing more. A person can do this only when they have a conscious system in place and if that system is built on principles that can withstand chaos and stress.

Open Loops = anything pulling at your attention that does not belong where it is, the way it is.
- You must first collect all these and then plan on how to handle them.

Most to do lists are just an inventory of stuff, not of the real work that needs to be done about them *(an amorphous blob of undo-ability)*.
- The key to managing all this stuff is managing your actions (it is the prime challenge).
- The real issue is how to make appropriate choices about what to do at any point and time.

You cannot DO a project. This is why they seem so overwhelming. You do not have an action step to take, and you can only DO ACTIONS related to it.
- The real problem is not lack of time, but clarity of what a project really is and what the next action steps are.

DO NOT think about things more than once. Write 100% of your thoughts down in a trusted system.
- Short term memory = RAM (a focusing tool, not storage). But the incomplete items are being stored in an incomplete storage space. And, like RAM, when it fills itself up, you will run sluggish and stressed (mental overload). The mind will keep reminding you about all of this when you cannot do anything about it. You stress and feel like a failure.
- Things are stored in this RAM unless consciously and objectively they are tracked and reviewed.
- Psychic RAM has no sense of past or future, so it pushes on you to be doing stuff all the time (this pressure happens with just two incompletions).

5 Phases to Managing Work Flow:

1. Collect things that demand attention.
2. Process what they mean and what to do about them.
3. Organize the results.
4. Review as options.
5. Make choices out of those options about what to do.

- All of these must be integrated together and supported with consistent standards (most people have leaks in this collection process).
- You must review to keep functional.

Phase 1 – Collect

- Anytime you say "should" or "need to" it becomes incomplete.
- Capture everything that might represent something you have to do and that at some point in the near future you will process and review all of it. This way you will not be distracted.
- For this to work:
  - Get it all out of your head. Keep them close by. This would be things like notebooks and PDA's.
  - Minimize the number of collection buckets.
  - Empty the buckets regularly!! This does NOT mean it needs to be finished; just take it out, decide what it is that should be done with it and, if still unfinished, organize it into your system. Do NOT put it back to "in".

Phase 2 – Process

- Ask yourself:
  - What is it?
  - Is it actionable?
    - Project = any desired result that requires more than one action step.

Phase 3 – Organize (see diagram)

- "Yes" categories to organize are:
  - *Projects List* (need defined next actions for each of them).
  - *Project Support Material* (store out of site, unless you need to access often while working on a specific project).
  - *Next Actions List*.
- Actions on specific time/day go on your *Calendar*.
  - Three things go on your calendar:
    1. Time specific actions (appointments).

2. Day specific actions (certain day, NOT time).

3. Day specific information (like directions, as an example).

- o IT EITHER GETS DONE THAT DAY OR NOT AT ALL. It cannot be moved to another day.

- Those needing to be done as soon as you can will be added to the *Next Actions List* because they are not time specific.

    - o Examples are phone call reminders.

    - o Sub-divide into categories (examples are phone calls, waiting for, etc.)

- Those waiting on others to do will go on the *Waiting For List*.

- "No" categories to organize are:

    - o Trash.

    - o No Action Now (or Incubation). Divide into the following sub-categories:

        - ▪ *Someday Maybe List* (stuff like books to read, movies to watch, etc.).

        - ▪ *Tickler File* (MUST update daily). You can use your calendar for this part.

            - Need 43 folders. 31 daily files labeled 1-31 and 12 more with the months of the year. Recommend using a labeling machine to make it clean and neat so you will use them.

    - o Potentially Useful or *Reference Material*. These are things like menus, magazine articles, etc. They need to be easily referred to when required.

Phase 4 – Review

- The weekly review is where you clean house. Gather and process all stuff, review systems, update lists, and get clean, clear, current and complete.

- The Calendar, Next Actions List, and Tickler File need to be reviewed daily.

- The Projects List, Waiting For List, and the Someday Maybe List need to be reviewed weekly.

Phase 5 – Choices (Do)

- The four criteria model for choosing actions in the moment (*Model 1*):

1. Content.

2. Time available.

3. Energy available.

4. Priority.

- Threefold model for evaluating daily work (*Model 2*):

1. Doing pre-defined work (working off your Next Actions List).

2. Doing work as it shows up (fire drills and the like).

3. Defining your work. This would be cleaning up your in-basket, e-mail, voice mail, new projects into actionable steps, etc. Identifying things that need to get done, but not immediately. Adding to lists.

- The six level model for reviewing your own work (*Model 3*):
    - o To know your priorities you have to know what your work is.
    1. Runway = Current Actions (accumulated list of all the actions to take).
    2. 10,000 Feet = Current Projects (generally short term outcome items).
    3. 20,000 Feet = Areas of Responsibility (things you must do as owner and head of family).
    4. 30,000 Feet = 1-2 year goals.
    5. 40,000 Feet = 3-5 year goals.
    6. 50,000 Feet = big picture (why do we exist?)

The 5 Phases of Project Planning:

- The key ingredient of relaxed control are:
    - o Clearly defined outcomes (projects and the next actions required to move them to closure).
    - o Reminders placed in a trusted system that is reviewed regularly.
- Plan informally and naturally. This will relieve stress and yield better results.
- *The Natural Planning Model*:
    - o Get it all down and give yourself freedom to do one thing at a time, without a feeling of responsibility to do anything about it. THEN be the Executive and go back to each thing and make decisions about what they mean, what you are going to commit to, and what you are going to do about them. THEN be the Manager and make tactical decisions about which thing to do about all the options.
    - o The mind naturally goes through the following 5 aspects of project planning:
        1. Defining purpose and principles. Clarify the primary purpose of the project.
        2. Outcome visioning. Agree on the standards/behaviors needed to make it successful.
        3. Brainstorming. Envision success and get all ideas on the table.
        4. Organizing. Identify mission critical components, milestones, and deliverables.
        5. Identifying next actions. Define all aspects of the project that could be moved on now, what the next action is for each part, and who is responsible for what.
- *The 5 Phases of Natural Planning*:

1. Purpose. Why? What is the clear, specific purpose? How will you know when you are on or off purpose?
2. Principals. Standards and values. "I would give others totally free reign to do this as long as they _____." What behavior might undermined what I am doing and how can I prevent it?
3. Vision Outcome. What does success look, sound, and feel like?
4. Clarifying Outcomes. Wouldn't it be great if…?
   - View the project from start to finish.
   - Envision wild success and suspend "Ya', but…"
   - Capture features, aspects, and qualities in place.
5. Brainstorming.

Getting Started

- If you do not want an all out implementation of this, a lot of the value is in creating good "tricks".
  - Tricks are for the not so smart, not so conscious part of us.
    - The smart part of us sets up things for us to do that the not so smart part of us responds to almost automatically. Creating behavior that produces high performance results. We trick ourselves into doing what we ought to. Examples are putting on exercise clothes will often make you exercise. You look and feel the part, so you do it. Another would be when you take work home that is due the next day you will often put it by the door so you will not forget to take it with you.
- Much of learning how to manage work flow in a black belt way is about laying out the gear and practicing the moves so that the requisite thinking happens more automatically.

Setting Aside The Time

- Create a block of time to initialize the process. Recommend 2 days, back to back. It is important to have no meetings or interruptions. Phone calls only on break. Do not do it after hours as this is not the best time for the mind (no horsepower).
- Once you do this you will have a huge sense of control and accomplishment; a release of energy.

Setting Up The Space

- Desk, writing space, in-basket, phone, computer, etc. Suggest same set up at home.
- Create your own work space and do not share it with someone else (even your spouse).
- Need paper holding trays:
    - Inbox.
    - Outbox.
    - Work in Progress Support.
    - Read/Review.
    - Also need things to hold your office supplies.
- Can implement into your current system, whichever will change the behavior appropriately.
- Just keep in mind, regarding types of organizers, all we need to do is *manage* lists. You have to be able to create lists on the run and review them easily and as regularly as you need to. Once you know what to put on the lists and how to use them the medium really does not matter. You just want it to be simple, speedy, and fun.

The Critical Factor of a Filing System

- A simple and highly functional personal reference system is critical to this process.
    - This is a general reference file (articles, brochures, notes, etc.). A good rule of thumb is things that will not stand up on a shelf, and you want to hold onto it for its info, need to go here. However, this is not for financial contracts, bank statements, etc. Those should have their own file.
- Filing MUST be instantaneous and easy. This is the system you empty your in-basket into. Keep these files within arms reach. Otherwise, you will not do it because you have to get up to file it.
- A-Z filing system (one system) by topic, project, person, and/or company.
- Have lots of fresh folders and keep the drawers less than ¾ full. If they are stuffed full you will resist.
- Use an auto labeler and get high quality cabinets. This will keep things neat and working well so you will not resist.
- Get rid of hanging files if at all possible. They are less efficient and more difficult to handle. If you must have them, create a separate file for each item to keep them thin and manageable.
- Purge files once per year. Have a dumpster day at the office. Or you can do it while you are on hold.

Collection – Corralling Your Stuff (Open Loops)

- *This is critical to full completion of the system*. This usually takes 2 to 6 hours.
- In the real world you will probably not be able to keep your stuff 100% collected. But it should be the ideal standard that keeps you motivated to clean house of all things about your work and life that have your attention.
- Why it is critical to gather EVERYTHING before you start processing:
    1. Gives you a sense of the volume of stuff you have to deal with.
    2. Lets you know where the end of the tunnel is.
    3. Keeps you from being distracted by all the stuff you have in your head.
- *You can feel good about what you are not doing ONLY if you KNOW what you are not doing.*

Physical Gathering

- Grab your in-basket (or stack of stuff) and some plain paper for notes.
- Grab anything in your physical environment that does not belong where it is, the way it is, permanently. If it is too big, write what it is on a note and put it with the rest.
- If you know it is trash then throw it away.
- *What about current lists and organizers?* Treat them like everything else in this stage.
- Go through *everything* and gather in this stack to start processing it. This may include art work, books to read, things on walls, office equipment/furniture, etc. Again, if it is too big make a note for it.

Mental Gathering

- This is the mind sweep. *Write everything in your mind down*. Make each item a separate sheet of paper so you can easily assign it.
- Go for quantity, not quality (grocery lists, projects, voice mail, e-mail, etc.)

Getting "In" to Empty

- Does not mean getting them done yet. It means identifying what it is, what it means, and what you are going to do with it.
- Rules to follow here:
    - Process the top item first and do not move-on until it is assigned.
    - Process one item at a time.
    - NEVER put anything back into "in".

- Processing does not mean spending time working on. It just means deciding on the "what's?" (above)
- *There is one path out of "in" and that is out.*

What's The Next Action

- THIS IS THE MOST CRITICAL QUESTION!!
    - Next actions are the next *physical*, *visible* activity that would be required to move the situation towards closure.

Identifying Projects

- More than one action item is a project.
- Place it in a Projects List, and it must be maintained.
- Negative feelings about your stuff stems from the fact that you have broken so many agreements with yourself to get stuff done that you do not trust yourself. This leaves you feeling overwhelmed and upset. To get rid of this negativity do 1 of 3 things:
    - Do not make the agreement (trash).
    - Keep the agreement (finish it).
    - Renegotiate the agreement (not broken, just moved).
- Capture these open loops and put them in a trusted system. Then you can trust yourself to get them done and not feel negative about yourself (it is either this or lower your standards, which will not happen).
- As soon as you tell yourself you should do something and you do not write it down, but file it in your short term memory (RAM), there is a part of you that thinks you should be doing it all the time. So as soon as you have more than one thing to do, it will lead to instant stress and negativity because you cannot do them both at the same time.
- The reason to collect *everything* is not that it is all equally important. It is actually because it is not all equally important. But if they are not written down your sub-conscious will give it the same attention, though they are vastly different.

When the Team/Organization Follows

- You will not be wandering if the ball is getting dropped.
- You need to be able to trust they will do what you ask or what they say they will do.
- Will suffer from "interuptitis" if do not have.

The Power of the Next Action

- Everything should end with "What is the next action?"
- Our bodies/minds do not know the difference between real and imagined. An example is the supermarket citrus section. Just thinking about the lemons will make your mouth water. Same with the "to do list". You will procrastinate because it overwhelms you so you just do not think about it. You need to break things out into doable next actions.
- You have to use discernment and discipline yourself in keeping your next actions list from going back to lists of tasks or sub-projects.
- To help determine the critical next action step focus on:
  - Clarity. What needs to be done?
  - Accountability. Who needs to do it?
  - Productivity. People must increase their operational responsiveness; they must think about things that lands in their world *before* they have to deal with it.
  - Empowerment. These above will lead to this. People will start to make things happen.

The Power of Outcome Focusing

- You cannot really define the right action until you know the outcome; and your outcome is disconnected from reality if you are not clear on what you need to do to make it happen.
- Things that have your *attention* need *intention* engaged.

Shifting to a Positive Organizational Structure

- It is critical to gage things against purposes and intended outcomes for an organization.
- Learn to ask, "Why are we doing this?" and "What will it look like when done successfully?" Applying the answers to a day to day operational level will create profound results.
- The standard should be to move from complaining and victim modalities to outcomes and actions defined for direction. This will lead to natural empowerment.
- The way people deal with their in-baskets, e-mail, voice mail, etc. is the microcosm reflected in the macrocosm of their culture and organization.
- Implement a new standard of high performance (Ritz Carlton; we are Ladies and Gentlemen serving Ladies and Gentlemen).