GTD®

AND

Outlook® 2007

DavidAllen

A smarter way to work & live®

803-25JUL13

Contents

1 Introduction

Getting the most out of Outlook® 2
The best practices of Getting Things Done® 3
The need for simple lists 3
Making your lists portable 4
Speed up your processing 4

2 Using Outlook Tasks

New definitions of "Category" and "Task" 9
Instructions for customizing your Task view 10
Customize your categories to work as lists 16
The best categories to start with 17
Linking projects to actions 24
Marking entries private 25
How to create a Task using the shortcut keys 26
Using due dates 26
Working with completed Tasks 26

3 Using the Calendar

Time-specific actions 27
Day-specific actions 27
Day-specific information 28
How to create a Calendar entry using shortcut keys 29
Reviewing your action choices 31

4 Managing Email

How to get email to zero 33
Organizing actionable emails 34
Delegating through Outlook 36
Option for categorizing emails 36

5 Other Useful Lists

How it works as a list manager 37
Some great categories and lists 39
Capturing information on the go 40

6 Tips about Contacts

Get good at creating new entries 41
Creative use of search 41

7 Conclusion

Additional resources 42

8 Speed Key Tips Sheet 43

© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

1. GTD® and Outlook® Introduction

GTD, the popular shorthand for Getting Things Done®, is the groundbreaking work-life management system and book[1] by David Allen that transforms personal overwhelm and overload into an integrated system of stress-free productivity.

Sophisticated without being confining, the subtle effectiveness of GTD lies in its radically common sense notion that with a complete and current inventory of all your commitments, organized and reviewed in a systematic way, you can focus clearly, view your world from optimal angles and make trusted choices about what to do (and not do) at any moment. GTD embodies an easy, step-by-step and highly efficient method for achieving this relaxed, productive state. It includes:

- **Capturing** anything and everything that has your attention
- **Defining** actionable things discretely into outcomes and concrete next steps
- **Organizing** reminders and information in the most streamlined way, in appropriate categories, based on how and when you need to access them
- Keeping current and "on your game" by regularly **reviewing** the six horizons of your commitments (purpose, vision, goals, areas of focus, projects, and actions)
- Instilling the trust that what you are **doing** is best thing for you to be doing in any given moment

Getting the most out of Outlook

For many of our clients, Microsoft Outlook is a logical choice for organizing their project and action reminders, especially if they already use Outlook for email and calendaring. This guide will walk you through applying the best practices of GTD to Outlook 2007. Consider these suggestions a starting point, customizable to fit your own needs and use of Outlook.

Outlook has features built-in to enable the structuring of a very powerful personal workflow system. The trick is to know which features to ignore and which to use, and how to customize that usage to fit with the best practices of Getting Things Done.

The Outlook Task function can be customized to be a simple but powerful list manager. The Outlook Notes section can be turbo-charged with some very useful reference material and checklists. Also, there are some simple things to do to manage email and the calendar that enhance their functionality and tie the whole inventory of your work together into a seamless and integrated dashboard for your workflow.

[1] *Getting Things Done: the Art of Stress-Free Productivity; Viking, New York; 2001, hardback or paperback. Available from booksellers or at www.gettingthingsdone.com*

© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

The best practices of Getting Things Done

In order to understand our specific recommendations for Outlook setup and usage and to maximize its potential in practice, it's important to clarify some simple but powerful productivity behaviors. These are fundamental to the success of the system.

1. Don't leave anything in your head or in unprocessed stacks

If your system contains only partial information, it won't give you the payoff of a system, and you won't be motivated to maintain it. For example, if your "Calls" list doesn't have every single call you need to make, your head will still have to keep remembering and reminding you about the rest of them. Trying to keep only some of them in Outlook will be too much work for the minimal benefit you'll gain.

2. Decide the next physical action

If you don't determine the very next action needed on a task or project or an email, you won't know where to park the reminder, and the pressure of still needing to make a decision will cause you to avoid engaging with your lists.

3. Review and update the contents of the whole system regularly

A system is only as trustworthy and beneficial as it is current, consistent and complete. The more the system can be kept up to date as you go along, the more "alive" and supportive it will be to allow your mind to focus on the work at hand. The world will probably come at you faster than you can keep it totally processed and organized, but you can't let it slip too long before you catch up. The reminders of projects and actionable items must be cleaned up and refreshed at least every seven days, in a process we call "The Weekly Review."[2]

The need for simple lists

Once you have appropriately processed your "stuff," simple lists will store most of your reminders and reference information. These can be "flat" lists—not tied or related to other things, nor sorted by priority or urgency—just lists. You need a list of projects, a list of all the calls you need to make, a list of all the things you are waiting for to come back from other people, etc. You may also want lists of your key objectives for the year, books you might want to read, and all the things you might want to pack whenever you take a trip. The Outlook Tasks section can be a terrific list manager for your actionable items and the Outlook Notes area can serve as a very functional catalog of checklists and reference material.

[2] *Visit our online store (www.davidco.com/products) for a free article on The Weekly Review or review pages 184-187 in the GTD book.*

© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

Making your lists portable

Another key success factor to using Outlook for personal management is having an easy way to publish the lists into some portable format and the behavior of actually doing that when needed. Any personal organizer will function at a much higher level when it contains everything that might be needed for a reminder anywhere (vs. some at the office, some at home, some in your briefcase, some in your head, etc.) It will need to contain a list of errands you need to run when you're out and about, things to talk with your spouse about when you're with them, and things to do at home when you have some time in that environment. If you subliminally know that your lists may not be with you when you might use them (such as your Calls list available whenever you have free time and a phone), you won't be motivated to keep them populated and current.

There are two ways to make your lists portable:

1. Synchronize to a handheld

You can set up Outlook to synchronize with a Palm®, Windows Mobile® or BlackBerry® handheld, using the software that comes with each of those devices. When you configure Tasks as we suggest, you will create lists as Categories, and these will map one to one to the Task/To Do lists on the handheld. Similarly, your lists in Outlook Notes will map to the Notes/Memo function on these handhelds.

On a BlackBerry, look for the Filter option under the Tasks menu to view your Tasks by category. On a Palm handheld, view by Category to see your lists by category.

Before choosing a handheld device, we suggest checking with your IT department first to see what device they will support and will allow to connect to your corporate data. Whatever system you end up using, master the basics early on, so that you are on "automatic," i.e., you're just using it, not thinking about how to use it, and not trusting your head more than the tool.

2. Print your lists into hard copy

Instead of using a handheld, some people choose to print out appropriate action-reminder lists into hard copy, including their calendar, to carry with them when they leave their computer. They then hand-edit those lists as they move around, in meetings, at home, or traveling, updating Outlook when they are back at their workstations. This can work fine, and in some cases, because of the additional visibility and note-adding capability of paper lists, better than a digital version. Outlook Tasks and Calendar can be easily printed using the File > Print menu.

Speed up your processing

The ease of making entries as you go, as things occur to you, is essential to using Outlook for action management. The system should work almost as quickly as you think, or it won't hold up to keep you current. Subliminal resistance to your data entry process usually creates a barrier for using any digital tool as a total system. The faster you are at the keyboard, the more you will be able to use Outlook as a highly leveraged personal productivity device.

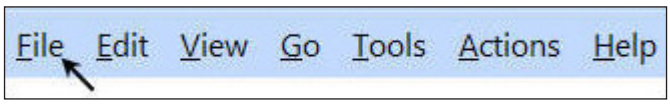
© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

Studies show you'll be four times faster using speed keys than reaching for your mouse. If you aren't using them already, learn the speed keys for the Windows and Outlook functions you use the most.

Standard Windows speed key combinations

<Ctrl> a – Select the whole document
<Ctrl> c – Copy whatever is selected to clipboard
<Ctrl> x – Cut whatever is selected to the clipboard
<Ctrl> v – Paste what's in the clipboard to the cursor location
<Ctrl> p – Print
<Ctrl> z – Undo
<Ctrl> y – Redo
<Alt> <Tab> – Switch between open Windows applications

In any Windows application, the speed keys for most menu functions within an application are the underlined letter, usually in combination with the Alt key.



Outlook-specific speed keys

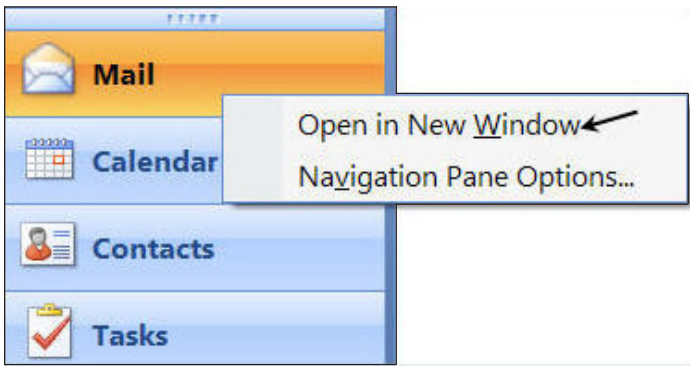
<Ctrl+Shift> k – Creates a new task
<Ctrl+Shift> a – Creates a new appointment
<Ctrl+Shift> n – Creates a new note
<Ctrl+Shift> m – Creates a new email msg
<Ctrl+Shift> e – Creates a new email folder
<Ctrl+Shift> v – Moves an email message
<Ctrl+Shift> h – Create a new MS Office file
<Ctrl> n – Creates new entry in current mode
<Alt> h+g – Categorizes open task

<Ctrl> 1 – Switch to mail
<Ctrl> 2 – Switch to calendar
<Ctrl> 3 – Switch to contacts
<Ctrl> 4 – Switch to tasks
<Ctrl> 5 – Switch to notes
<Ctrl> 6 – Switch to folder list
<Ctrl> e – Go to the search box
<Ctrl> r – Reply to open message
<Alt> s – Send or save

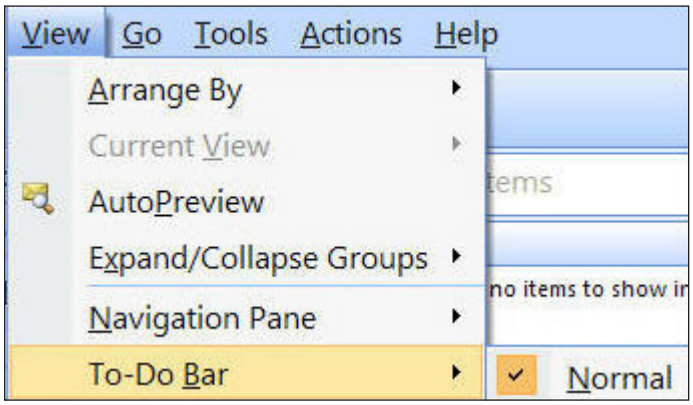
Note: these shortcuts are also posted in the back of this guide.

© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

Setup your navigation bar to show the most frequently used features of Outlook. From within any area of Outlook, select **View > Navigation Pane > Normal**. You should see at least 4 bars in the left hand corner of your screen, with additional icons along the bottom. You can adjust bars in view by clicking and dragging on the horizontal line above Mail to expand or collapse the bars you wish to see. You can also change the order of the bars shown by right-clicking any of the bars and selecting Navigation Pane Options.

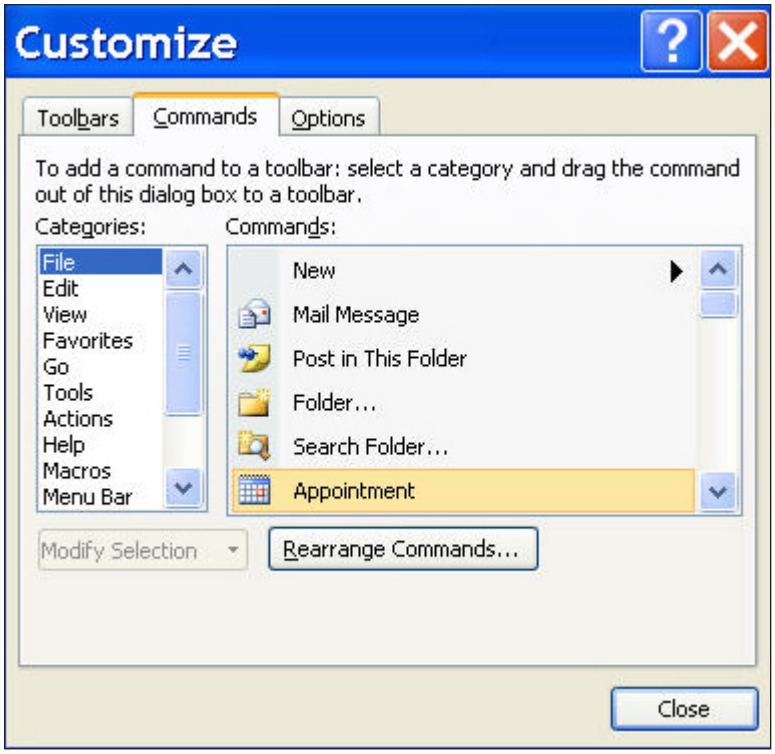


Start your day by creating open windows for Email, Tasks, and Calendar
<Alt><Tab> will enable you to move through these applications instantly as your thinking moves between them. Right-click on Mail, Calendar, and Tasks, one at a time, and select **Open in New Window.**



To be able to view your Tasks from within your Mail, Calendar and Contacts, be sure the To-Do Bar view is selected. From within each of those sections, select **View > To-Do Bar > Normal**.

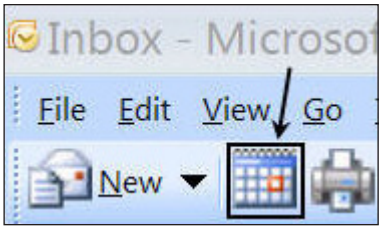
© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com



Create icons on your Outlook toolbar.

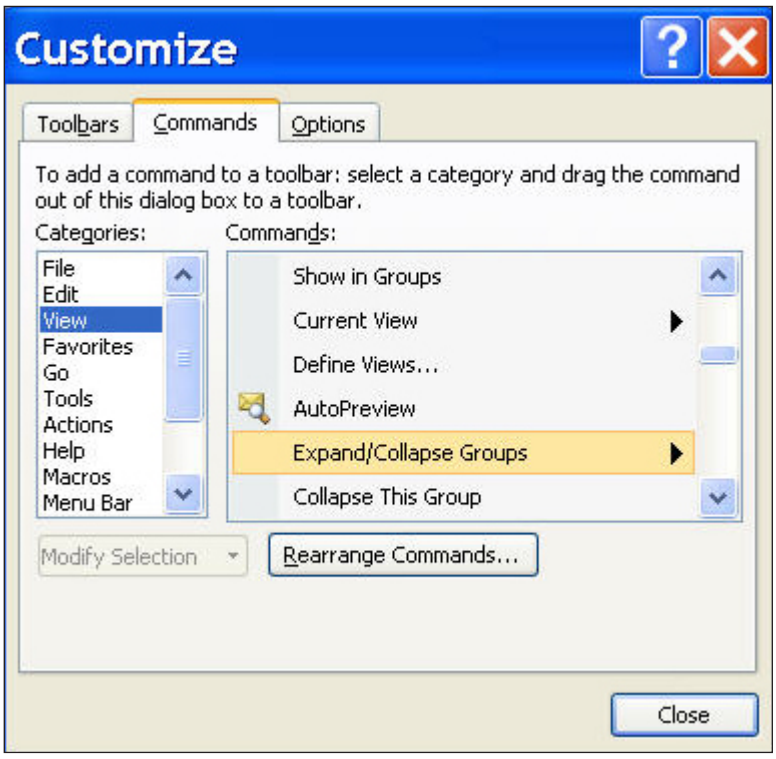
As another option to speed keys, configure your toolbar for frequent menu selections. Go to **View > Toolbars > Customize**. Select the Commands tab. On the left side under Categories select File and a unique list of icons will appear with "commands" that you can add to the toolbar. We suggest adding the ones you use most, such as Email, Appointments, Tasks and Notes.

To add a command to a toolbar, select a command with the left-mouse button. While continuing to hold down your left-mouse button on the selected command, drag the item to the desired location on the toolbar. Let go of your left-mouse button to insert your command onto the toolbar.



© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com

Under the View Category, you will also see a command for Expand/ Collapse groups. This is a handy one to add, for when you want to quickly collapse or expand Task lists. Drag that to your toolbar as well.



How's your typing speed?

We highly recommend that you get up to a typing speed of at least 50 words per minute. If you are not there yet, we strongly suggest you install and practice with a good software typing tutor. Your keyboard is becoming at least as important as your phone as a communication device (with yourself as well as with others). Your computer can be a strategic "think station" and especially so when there is little or no effort in getting a thought into it. Increasing your ease and speed with your input device may have more payoffs than you think. A great typing tutor is Typing Master®, available from www.davidco.com/store or www.typingmaster.com.

© David Allen Company 2002, 2008. GTD® and Outlook® All rights reserved. www.davidallengtd.com