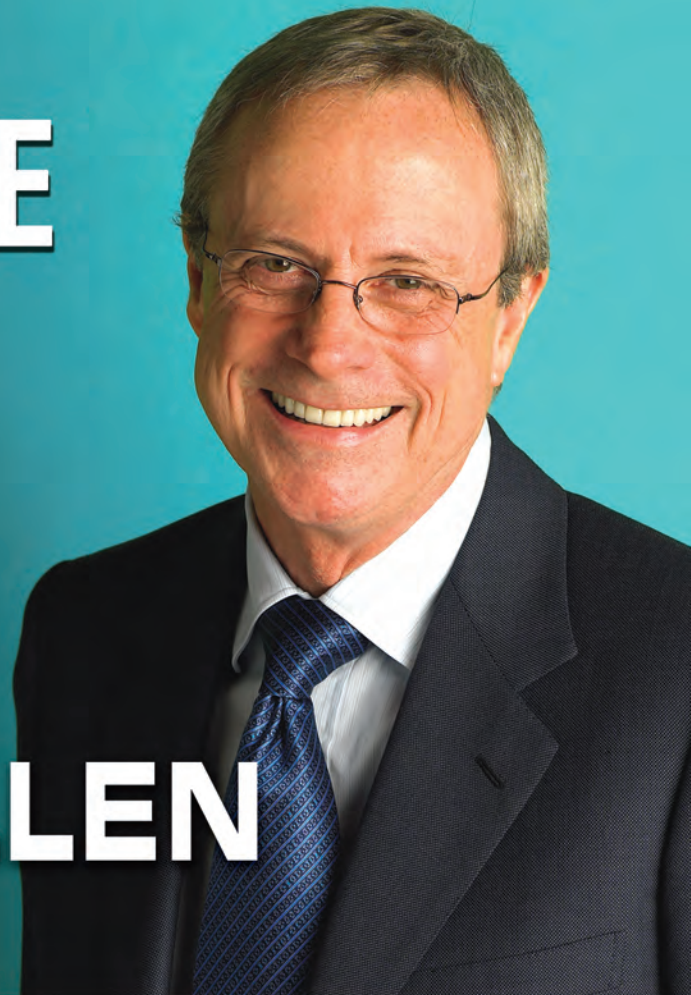


**Nightingale
Conant**

GETTING THINGS DONE

WITH
**WORK-LIFE
BALANCE**

DAVID ALLEN



WORKBOOK

IMPORTANT

To begin — Please save this workbook to your desktop or in another location.

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INTRODUCTION

How to Use this Workbook and your GTD System Guides

Welcome to *Getting Things Done with Work-Life Balance* by David Allen. In this program you'll learn some time-tested "best practices" to help you work more productively with greater ease.

How can you get the most out of this workbook and your GTD System Guides? By using them in conjunction with the audio program. For each session, we recommend the following:

- Preview the section of the workbook and GTD System Guides that correspond with the audio session.
- Listen to the audio session at least once.
- Complete the exercises in this workbook.

Please note that this workbook includes spaces to write in your responses to the exercises. Because your responses might be longer than the space allows, it's a good idea to use additional paper so that you can write out your responses without space constraints.

Let's get started.

CD 1 – THE NEW REALITY OF GETTING THINGS DONE: THE FIVE STAGES OF GETTING CONTROL, PART 1

Stage One: Collecting

- Capturing anything and everything that has your attention. Here are some ideas:
- Use paper to write down notes and ideas and put the pages into your own in-basket.
- Carry a small paper pad with you when you move around to capture ideas or notes.
- Call your own answering machine/voicemail to leave yourself a message.
- Carry a digital recorder with you to capture ideas.

*It can take anywhere from one to six hours just to
identify all the loose ends in your life and work.
How long depends on your volume of “stuff.”*

You can gather anything incomplete around your desk and add that to your in-basket. As you walk around your environment, you can capture ideas and notes on individual pieces of paper and add those notes to your in-basket. So, when you take the next step – “Processing” – you can work with each item individually.

Use the enclosed System Guide entitled “Incompletion Trigger List” to help trigger any ideas you have in your mind that are not already represented on a piece of paper in your in-basket.

YOUR TURN

Are there any additional tools to assist you in making collecting and capturing easier for you?

Stage Two: Processing – clarification

The next stage is processing what you have collected. Refer to the GTD System Guide entitled “Workflow Processing & Organizing.”

Process one item at a time (decide what each thing means, specifically).

If it is not actionable – toss it, “tickle” it for possible later action, or file it as reference.

If it is actionable – decide the very next physical action.

YOUR TURN

Take each item out of your in-basket and walk yourself through the “Workflow Processing & Organizing” flow diagram.

*If you don't go through those two processes
but try to get “organized” first,
you end up rearranging incomplete
piles of unclear stuff.*

CD2 – THE NEW REALITY OF GETTING THINGS DONE: THE FIVE STAGES OF GETTING CONTROL, PART 2

The Two-Minute Rule

Once you have decided the next action step on something, and you can actually finish that action in two minutes or less, it is more efficient to take that action. It will take longer to organize and review it than to finish it immediately.

Stage Three: Organize

Once you make the processing decisions, group the results of any deferred actions into easily reviewable categories. Refer to the GTD System Guides entitled “Mastering Workflow” and the “Workflow Processing & Organizing” flow diagram.

The List of Your Lists

For the most part, many of the things that you’re going to want to track can just be tracked on lists. For instance, a list of all of your calls, errands, or larger projects or outcomes.

Here are some of the ways you can keep track of lists:

- A loose-leaf notebook
- A paper planner or organizer
- Computer applications that have a simple list manager capability
- Email folders
- Paper file folders

Project List and Project Notes

You will need a master list of all of your projects so you can view them at a glance. If any of those projects have additional notes or collateral support materials, you can collect those materials in a separate place like a file folder so when it’s time to work on that project, you can pull out those materials to refer to.

Next-Action Lists

These are the lists of the various actions that you want to take. Calls to make, things you are waiting for from others, things to buy next time you are at your local store, or things to talk to your partner about. These will be the most commonly referred to lists, in addition to your calendar.

Calendar

Use your calendar to hold only three things:

- Time-specific actions (like a meeting or phone call scheduled at a specific time)
- Day-specific actions (things that must be done on that day not tied to a specific time, e.g., submit a proposal)
- Day-specific information (e.g., your sister's birthday or when your business partner is back from vacation)

...and that's all!

Having a good list manager to easily enable you to keep track of and view the actions you want to take, as well as the larger projects those actions relate to that you are committed to trying to finish, is a key component to getting organized.

The Tickler File

This is a simple, perpetual set of file folders labeled with the 31 days of the month and the 12 months. Use this tool as a way to return items and information to you for review or action on a specific date. It is a way to mail things to yourself. Refer to the article on the davidco.com website for a free article on setting up and using a tickler file.

YOUR TURN

What are some of the ideas you have to create an organization system that will work for you?

Stage Four: Review and Reflect

The most common review that most people need to build into their life is what we call the "The Weekly Review," spending one to two hours every seven to 10 days to keep your system updated and current. Refer to your GTD System Guide entitled "The Weekly Review" for the complete process. You can use this template to walk yourself through this once a week.

Stage Five: What Do I Do Now?

Now that you have all of the lists and actions you need to take, how do you decide which is the most important item to take action on right now?

Let's look first at the limiting factors.

The first priority is determining *what is even possible for you to do right now*. If you're at work, then you cannot do anything on your "at home" list. So the first limiter is context.

The second limiter is how much time you have. If you are at work, you could still have many options to choose from on your "at work" list. If you have a meeting in 20 minutes, what you won't want to do is pick some action that's going to require 40 minutes of uninterrupted time. You'll want to pick something you can do in the 20 minutes you have.

The third limiter is how much energy you have. There are times when it would actually not be to your advantage to be making important phone calls that require you to be fresh in your thinking. At those times, your priority will be to do some smaller things that do not require a great deal of brain power.

First is context.

Second is, How much time do I have?

Third is, How much energy do I have?

The Threefold Nature of Work

At any time during your day, there are three kinds of work you can be doing:

- 1) Picking things to do off your lists – doing predefined work
- 2) Doing work as it shows up
- 3) Defining your work – processing new things (processing new input through the flow diagram)

CD3 – GETTING THINGS DONE CAN BE STRESS-FREE – BELIEVE IT!

Good planning is driven from intention and purpose.

The Natural Stages of Planning

We actually go through five recognizably different stages of how we think through something. Once you understand these distinct stages, you can easily apply this process to new situations.

- 1) Purpose/Guiding principles
- 2) Mission/Vision/Goal/Successful outcome
- 3) Brainstorming
- 4) Organizing
- 5) Next actions

Refer to your GTD System Guide entitled “Natural Planning Model®.”

YOUR TURN

Try out the natural planning process on something you would find value in planning. Keep it simple: the next family vacation, school trip, or staff meeting. Using the enclosed template in the System Guide, walk your self through your project. On the reverse side of the Natural Planning Model template is a list of triggers you might also find useful to look through.

- 1) Purpose/Guiding principles
-

2) Mission/Vision/Goal/Successful outcome

3) Brainstorm ideas

4) Organize the results

5) Next actions (identify and capture all next actions onto your lists)

Putting the Process to Work

The Tools You Need

- A functional, easily accessible filing system for reference material
- Paper and a pen
- An in-basket
- A trash can

Step One: Walk Around

The first physical process is actually identifying all the incompletions in your environment. In other words, whatever does not belong there permanently throw into your in-basket. If the item is too big to fit in the in-basket, then write a note about it and put that in the in-basket. At first, you might need a box or a designated corner of a room to collect or capture into.

This can take a while. It depends on how big a space you are collecting from, and it depends on how thorough you want to be with this process. Consider your office space, your storage spaces, your home, and even your car. Frankly, anywhere that you have anything out there that may be some reminder of some commitment you have made or something that you would consider incomplete.

Step Two: The Mind Sweep

So once you've gathered all that stuff, then you need to do what we call a mind sweep. This is the process of capturing all the things that are still in your head that may not be represented by the things you've captured on your desk or in your in-basket yet. Refer to the GTD System Guide entitled "Incompletion Trigger List." Give yourself permission to grab everything and anything.

Step Three: The Decision-Making Process (using the "Workflow Processing & Organizing" flow diagram template in the System Guides)

Once you've gathered all of your "stuff," you need to walk yourself through the decision-making process. Pick one item up at a time and walk yourself through this thinking process.

- The first question is: What is it?

- Once you decide that, then the key question is: Is there some action required on this or not, yes or no?
- Now, once you make that decision, you've got some options. If there's no action needed on this, then you can toss it, trigger it for later review, or file it.
- If yes, what is the next action on this?
- Once you determine the next action, before you actually write something down, there are some key tactical questions you need to ask yourself.

The first one is, How long will this action take? (This is where the two-minute rule comes into play. If the action is going to take only two minutes or less to do, just do it right then.)

The next question is, Is this something I can delegate?"

If this is not a two-minute or less action and you cannot delegate it, then defer it to one of your action lists.

The Art of Effective Delegation

You should have some effective way to be able to delegate while you're cleaning up your in-basket. It can be a written note you put in your own out-basket to deliver to your assistant or a staff person. Sending an email is often the most effective way to delegate, because it's instantly available to you, it's not interrupting to them, and you can both track a copy in your systems.

The third way to delegate is if you need to sit down and meet with someone face to face. In this case, you can have a folder or list for this person, and that's where you'd want to put these items. So the delegate piece actually becomes an agenda to go over with that person when you meet with him or her.

Waiting for...

This is a list of all the things you are waiting for other people to finish or get back to you about. It needs to be its own list. We suggest adding the date you wrote it so if you need to follow up, you'll know how long you have been waiting.

Email

Ideally, you want email to be emptied out as often as your voicemail, your answering machine, and your physical in-basket. As a matter of fact, there's really no difference between them. There is a way to get your email in screen processed quickly and easily and actually empty it.

The way you deal with email is the way you deal with everything else – you process it.

First, delete the things you don't need anymore.

Second is to file any emails that you don't have any actions about. A lot of people are using their in-basket in their email system to keep emails just for archive purposes, but your email systems have folder capability. Usually in the navigator bar on the left-hand side is where you can set up and build folders that you can then drag or just move emails that don't have any action on them.

The third thing to do is handle the less-than-two-minute ones. That only leaves two kinds of emails in your in-basket: emails that are going to take you longer than two minutes to address and to deal with, and emails that represent something you're waiting on to come back from other people.

You can handle these quickly by creating two folders in your navigator bar along with your reference folders, but you want these folders to look different because they're going to be different in function.

You want to create a folder called "Action" and one called "Waiting For," and you might start with a prefix, like an @ sign or a dash symbol, some kind of prefix that will bump it to the top of your folders. Then take all the emails that take longer than two minutes to deal with and drag them into your action folder. Take all the emails that represent things you're waiting for and drag those into the waiting for folder. Now you have an empty email basket!

It can take from 30 to 90 minutes per day for most people to "process" the new "stuff" coming into their world.

CD4 – DOING, DOING, DOING, CHOICES, CHOICES, CHOICES, ACTION!

A critical success factor is consistently spending time on a regular basis to make sure that the action choices and projects in your system are complete.

Trusting the System

Trusting the system means it's not just that you've written everything down that you need to, but that you also have the behavior to engage with that information as often as you need to. So if I didn't trust I was going to do a weekly review within the next few days, some part of me will then be constantly thinking about what I should be thinking about to bring up the rear guard. So I have to trust I have the behavior to come back to it. I also have to trust that I'm going to clean up my in-basket. That also gives me the freedom to not have to worry about it when I'm moving around. Refer to the GTD System Guide entitled "The Weekly Review."

The more you can trust that you have a good system and a good systematic approach, the freer you are to be spontaneous and follow your own creative intuitive hunches.

Next-Action Thinking

Next-action thinking means really finishing your thinking down to the next physical, visible things that are required to move you forward on your commitments. It's something you can train yourself to do on the front end. You can train yourself to consistently ask, "What's the next action needed here?"

Making the next action decision doesn't mean that you have to take that action right then. It means that you're not avoiding the thinking about what to do, and then, if you decide not to do it, it's simply a priority judgment call that that's not the action you want to take.

Outcome Thinking

Outcome thinking is asking, “What are we trying to accomplish or finish?” This is the fundamental thinking process that underlies all of this. Asking and answering for ourselves what the outcome or project is, and what the next action step is. Then the critical component to that is making sure you’re parking those answers in appropriate places so that you can give yourself the kind of focus you need when you need it and where you need it.

Procrastination

Procrastination is something that we’ve all faced at one point or another. This system will go very far to alleviating the causes of procrastination. Oftentimes, procrastination comes because something truly just isn’t that important to you. Too often we think we “should” do something, or we “could” do something, but we really don’t want to. The way to solve this problem of apathy is to create a “someday maybe” list. You just need to make sure you’re looking at that list regularly, and just say no. In other words, you renegotiate with yourself.

Another thing that can cause procrastination for people is a sense of fear, discomfort, or anxiety about doing something. And that anxiety could be mental anxiety, physical anxiety (a sense of being out of control), or emotional discomfort.

- Mental anxiety comes when you don’t know how to do something. Maybe it’s more complex than you thought, or you don’t have all the data. This is probably the most common source of procrastination.
- Physical anxiety is when you don’t want to feel uncomfortable physically. Clearing out the clutter in your garage could be an example of this.
- Emotional discomfort is when you have to do something that’s emotionally challenging. Many people will avoid the emotional discomfort of having that conversation with a co-worker, a parent, or a teenager.

The solution to this kind of procrastination is by simply getting things down to the next action. It may be the wrong next action, by the way – you know, live and learn – but at least you’ve got it down to the next action. Keeping your mind focused simply on the very next action about anything that you may be potentially procrastinating about will probably unstick it.

CD5 – GETTING THE LOOSE ENDS TO LEAVE YOU ALONE ONCE AND FOR ALL!

Cleaning up creates new directions

If you're not quite sure what to do, there's absolutely nothing better than to go do something you know that needs to be cleaned or cleared up. Where there is residue, there is old business.

Clearing things up results in a couple of things. First of all, it keeps you engaged positively, so instead of stewing and procrastinating or getting hung up, doing nothing and then feeling bad, you can at least start to get yourself engaged in positive motion. Second, as you start to clear things up, you will start to access or gain energy that you would not have had before.

When in doubt, clean a drawer.

You can feel good about what you're not doing only when you know what you're not doing

To a large degree, an indicator of how well you're managing yourself is how comfortable you are feeling about what you're not doing right now. We all have to make choices in any given minute about what to do and what not to do. But if you have a system you can trust, you can feel good about the choice you've made.

If it's on your mind, it's probably not getting done

There seems to be an inverse relationship between the amount something is on your mind and the amount it's actually happening in the world out there.

When something is distracting you, or something is on your mind, usually the reason is because some part of you does not trust that you've made the appropriate decisions that you need to make about it or that you haven't parked the results in some appropriate place that you trust.

Creativity shows up when there's space

As you get your mind emptier and emptier, by keeping your commitments out in front of you by collecting and processing and organizing these things appropriately, the emptier your head is, the more your life just becomes a creative flow of choosing activities.

Worry is a waste

If you're worrying or complaining about a situation, some part of you is assuming that it could or should be better, but you're probably not involved in actually making it so. You actually don't worry or complain about something you assume can't be different.

Instead of worrying or complaining, throw the idea or issue into your in-basket. Pick it up. What's the next action? What am I going to do about that? Then what happens is that the complaining just disappears. You can move issues from problems to projects with next actions.

You are not your work

As people start to disassociate their work and their commitments from inside their psyche and put them into a system, they start to realize that they are bigger than all of their action lists. If you don't write it down, if you don't name it, it kind of owns you.

For more clarity, look from a higher place

Your altitude is going to make a lot of difference in terms of the horizon that you can see. When you lift up, you'll be able to see a broader horizon. Now that doesn't mean that you can exist constantly in an elevated view, because you always have to come down to the level of detail of activity and action. But, it's another reason that there's a lot of practical value to having this very workable model of the six horizons of focus. They'll give you a nice ladder to climb up on in case you need it. Refer to the GTD System Guide entitled "Horizons of Focus."

The clearer your purpose, the more ways to fulfill it

It's a strange paradox. It's almost the more specific you can get about why you're really doing something, the more freedom it will give you to be innovative and creative about how to get there.

Many times, we forget the why question. Once you get clear on why you are doing something, almost without fail, you will probably see some new and creative options that you would not have thought of had you not backed off.

Perspective is the most valuable commodity on the planet

Your point of view, the angle from which you're viewing things, is going to be the most important.

It's the smart people who realize they're not smart all the time and build in tools that'll pull them back. It's the dumb people who think they're smart all the time, and, therefore, don't set up tools in their life, so when they're not so smart, they have nothing to pull them out of the hole.

You have to think about your stuff more than you think, but not as much as you're afraid you might

It doesn't take a lot to get very complex things off your mind, but it's not free. You have to sit down, look at them, clarify the outcome, clarify the action step, park the results in trusted places, and then your mind gets to let go. Done for now – not forever, but for now.

Getting things done is not about getting everything done.

CD6 – CREATING STRUCTURES THAT WORK FOR WORK-LIFE BALANCE

If you know what you are doing, efficiency is the only improvement opportunity

When you know where you're going, getting there with less effort or more class and more ease and more elegance is the real improvement opportunity.

What this means is that in the bigger scheme of things, understanding and uncovering what it is that we're about, what it is that really matters to us and where we're going is more of an unfolding and an uncovering process as opposed to going and making something brand-new up.

Only one thing on your mind is 'in the zone'

If the only thing that's on your mind is truly the *only* thing on your mind, then you're in "the zone." In other words, if there's only one thing you're focused on and a part of you gets totally engaged with what that's about, then you're truly in that state where time disappears; all of your energy and focus are available for that one thing you're participating in.

The value of a future goal is the present change it fosters

The future is an illusion, but it's an extremely powerful one. We always seem to be thinking about something, so thinking about some sort of positive future is certainly going to be much more effective than the negative self-talk most adults do. Focusing on a positive future, on how good it could be, will start to positively impact and affect the things that you see and how you're feeling.

Form and function must match for maximum productivity

Oftentimes we have a purpose and then we build structures around it to support that purpose. But then the purpose may change or things may start to move differently out there, but we don't change our forms. In order for productivity to be maximized, you have to be willing to change form and structure to fit the purpose.

YOUR TURN

Take a look at some process or structure in your work or personal life. Ask yourself, "Do we need this rule? Do we need this policy? Do we need this procedure? Are we willing to give it up and unhook from these things when we rediscover that there's another way that we could be getting it done?"

Your system has to be better than your mind for your mind to let go

Building a set of tools that are placeholders for your mind's thinking process allows you to think better, faster and easier, and more clearly. But your mind knows absolutely whether or not there is something outside of itself that's keeping track of the commitments that you've given it to keep track of. Your mind has to learn to trust that your system will do a better job than it will in keeping track of things.

Response-ability improves viability

Having a clear, clean, and current system allows for your communications to flow more easily. Being able to leave things for each other and trust that you and others won't let that communication slip through a crack relieves a lot of the "miscommunications" pressure in relationships. And it can significantly improve the quality of life.

You can't win a game you have not defined

A lot of defining your work has a lot to do with defining the game of your work. What is the "win"? Oftentimes we have projects, but we haven't yet defined them as such. We have problems or situations that we want to resolve, but we haven't really defined the edges of our commitments.

Whenever two or more are responsible for something, usually nobody is

Some of the questions that tend to be avoided, especially in situations in which you like to think of yourself as being collaborative are, "So what did we decide? Who's got the next action? Is this yours or is this mine?"

Unless you feel a sense of responsibility that says, "Look, I'm the one who's got to make sure this happens," very likely it won't give you the focus that you need to cross the finish line.

Use your mind to think *about* your work instead of thinking *of* it

When your mind doesn't have to be too concerned about remembering and reminding you about things, your mind is then freed up to make good, intuitive choices and to do creative developmental thinking about stuff. In other words, if your brain doesn't need to remember the details about where and when, your mind is freed up to explore other creative ideas about that situation.

YOUR TURN

Take a look at one of your projects. Let your mind wander to explore creative developmental thinking about it.

Priorities function only at the conscious level

All of your actions and projects have relative importance to you but only when they are consciously weighed against each other. If something is filed away only in your mind, it will use inappropriate, unproductive thinking space and will probably be over- or undervalued.

Every priority choice is still going to be an intuitive one. But what moves you from hoping that that choice is right to trusting that that choice is right is a conscious recognition of all of the horizons of your commitments and being able to review and reflect on them in a conscious, objective way.

Knowing your commitments creates better choices of new ones

If you don't know the total inventory of your work, you won't be fully aware of what you can't do. Your integrity will lead you into an infinite amount of new to-do's. When you consciously track all of your commitments, that same integrity will force you to discriminate and say no, because you will be more aware of your capabilities.

YOUR TURN

What is one area where you are overcommitted right now? Can you renegotiate that commitment with yourself or someone else? Can you move this to your someday maybe list?

Getting to where you're going requires knowing where you are

Objectively viewing your current reality always reduces confusion and misalignment. Agreement with yourself and others about what is true right now – in your company, on your project, in your life – is crucial for making clear headway.

Closing open loops releases energy

No matter how unimportant they seem or how unconscious we are about them, unfulfilled commitments consume our mental energy, which is then unavailable for other uses. When these unfinished items are brought to the surface and completed (or acknowledged as complete, as is) previously inaccessible energy shows up.

CD7 – RELAX AND GET GOING!

You're the only one playing your game

The good news is that you are responsible for your own game, defining that game, playing the moves, and calling the play. The best players manage their own game no matter what.

Too controlled is out of control

If you're too tight, if you have too many structures, if you have placed too much constriction on yourself, it limits your flexibility, your ability to reconnect and recalibrate rapidly.

A key element is creating the structure you need to support your creativity and freedom. As soon as your structures start to constrict you, give them up.

YOUR TURN

Is there any "overkill" in your system? What procedures or tools have you set up that you are not using? What can be eliminated?

The better you get, the better you'd better get

If you finished everything on your list right now, if you actually completed everything, you're going to get so excited and so enthused, you're probably going to take on bigger, more incomplete, and more ambiguous things. Life is never "done."

Your power is proportional to your ability to relax

Being relaxed and capable of being focused on what's at hand, when it's at hand, without over- or underreacting, is a master skill. It's the context for accessing the greatest power.

Surprises, expected, are no surprise

A really effective system is one that is built ready to take in new input, ready to refocus itself and recalibrate appropriately so that it still then serves as a system, no matter what. It does take quite a bit of sophisticated expertise to get your systems down, to get your processes down, so that some part of you is really looking at all of those interruptions and surprises as new opportunities.

The longer your horizon, the smoother your moves

If there is something of importance to you, whether it's in your personal life, in your professional life, or in the mix of the two, the more you can stay focused on the bigger game, the easier life is going to be.

If you truly know why you're on the planet, what your purpose is as a human being, it will be a lot easier to navigate through the ups and downs of your day and not get too wound up in the "short horizon" things that happen.

You speed up by slowing down

From time to time, it's a good idea to skip a beat, take a breath, and relax. You'll make better choices. You'll have much more of your brain available to you. There'll be more oxygen in your head. It's just a healthier thing to do.

Small things, done consistently, create major impact

Sometimes, you get bigger results from consistent, small actions than you do with major ones. And, if you focus on the direction you're going instead of forcing yourself to have discipline, you'll be drawn toward the goal.

You have to do something to know something

Ninety-nine percent of the time, you actually won't know how to do anything until you actually get going. Getting up and moving toward something is the fastest way to start to generate information about it, because it seems as if forces in the universe tend to line up behind us once we put our body on the line, once we demonstrate and express that intention toward something.

YOUR TURN

Is there something you've been waiting to take action on because you don't know how to do it? What is one "next action" you can take?

The biggest successes come from the most failures

Everyone has a natural resistance to taking action that may not be the right action. You want to set up your life so that you can make as smart a decision as possible. Give yourself the best tools that you can so that you've got as easy a path to get from here to there as possible.

But you've got to be willing to understand that the people who have made the most money are most likely the ones who also lost the most money. The people who have the most successful lives are the people who have gone out and made probably some of the biggest mistakes. The main key about the high performers is they don't make the same mistakes again.

YOUR TURN

What are some risks you can take today? Are there any new things you can try that might move you toward where you want to go?

**ADDITIONAL RESOURCES TO SUPPORT YOUR
IMPLEMENTATION OF THIS PROGRAM:**

Ready for Anything:

52 Productivity Principles for Work and Life

By David Allen

(Viking; 2003)

Making It All Work:

Winning at the Game of Work and the Business of Life

By David Allen

(Viking; 2008)

Free Productivity Principles Newsletter, Articles, Tools, and Gear at:

www.davidco.com

**ADDITIONAL RECOMMENDED LISTENING
FROM NIGHTINGALE-CONANT:**

You, Inc.:

Creating Your Life as a Free Agent
By Terri Lonier, Gail Blanke, William Bridges,
Guy Kawasaki, and Daniel H. Pink,
19800CD

Available from Nightingale-Conant —

Phone: 1-800-525-9000

or visit our website at www.nightingale.com

or for our UK clients

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Incompletion Trigger List

What do you have attention on?

Personal

Projects started, not completed

Projects that need to be started

Projects - other organizations

service, community, volunteer, spiritual organization

Commitments/promises to others

spouse, partner, children, parents, family, friends, professionals, returnable items

Communications to make/get

calls, emails, faxes, cards, letters, thank-you's

Upcoming events

birthdays, anniversaries, weddings, graduations, outings, holidays, vacation, travel, dinners, parties, receptions, cultural events, sporting events

Family

projects/activities with spouse, partner, children, parents, relatives

Administration

home office supplies, equipment, phones, answering machines, computers, internet, TV, DVD, appliances, entertainment, filing, storage, tools

Leisure

books, music, videos, travel, places to visit, people to visit, web surfing, photography, sports equipment, hobbies, cooking, recreation

Financial

bills, banks, investments, loans, taxes, budget, insurance, mortgage, accountants

Legal

wills, trusts, estate, legal affairs

Waiting for

mail order, repairs, reimbursements, loaned items, information, rsvp's

Home/household

real estate, repairs, construction, remodeling, landlords, heating and A/C, plumbing, electricity, roofs, landscaping, driveways, garages, walls, floors, ceilings, decor, furniture, utilities, appliances, lights and wiring, kitchen stuff, laundry, places to purge, cleaning, organizing, storage areas

Health

support and maintenance, doctors, dentist, optometrist, specialists, checkups, diet, food, exercise

Personal development

classes, seminars, education, coaching, career, creative expressions

Transportation

autos, bikes, motorcycles, maintenance, repair, commuting, tickets, reservations

Clothes

professional, casual, formal, sports, accessories, luggage, repairs, tailoring

Pets

health, training, supplies

Errands

hardware store, pharmacy, department stores, bank, cleaners, stationers, malls, gifts, office supply, groceries

Community

neighborhood, neighbors, service work, schools, civic involvements

Incompletion Trigger List

What do you have attention on?

Professional

Projects started, not completed

Projects that need to be started

“**Look into**” projects

Commitments/promises to others

boss, partners, colleagues, subordinates, others in organization, other professionals, customers, other organizations

Communications to make/get

calls, emails, voice mails, faxes, letters, memos

Writing to finish/submit

reports, evaluations, reviews, proposals, articles, marketing material, instructions, summaries, minutes, rewrites and edits, status reporting, conversation and communication tracking

Meetings

upcoming, need to be set or requested, need to be de-briefed

Read/review

books, periodicals, articles

Financial

cash, budget, balance sheet, P&L, forecasting, credit line, payables, receivables, petty cash, banks, investors, asset management

Planning/organizing

goals, targets, objectives, business plans, marketing plans, financial plans, upcoming events, presentations, meetings, conferences, travel, vacation

Organization development

org chart, restructuring, lines of authority, job descriptions, facilities, new systems, change initiatives, leadership, succession planning, culture

Administration

legal issues, insurance, personnel, staffing, policies/procedures, training

Staff

hiring, firing, reviews, staff development, communication, morale, feedback, compensation

Systems

phones, computers, software, databases, office equipment, printers, faxes, filing, storage, furniture, fixtures, decorations, supplies, business cards, stationery, personal organizers

Sales

customers, prospects, leads, sales process, training, relationship building, reporting, relationship tracking, customer service

Marketing/promotion

campaigns, materials, public relations

Waiting for

information, delegated projects/tasks, pieces of projects, replies to communications, responses to proposals, answers to questions, submitted items for response/reimbursement, tickets, external actions needed to happen to continue or complete projects...(decisions, changes, implementations, etc.), things ordered

Professional development

training, seminars, things to learn, things to find out, skills to develop or practice, books to read, research, formal education (licensing, degrees), career research, resume

Wardrobe

professional

Natural Planning Model®

1. Purpose/Guiding Principles

- Why is this being done? What would “on purpose” really mean?
- What are the key standards to hold in making decisions and acting on this project? What rules do we play by?
- The purpose and principles are the guiding criteria for making decisions on the project.

2. Mission/Vision/Goal/Successful Outcome

- What would it be like if it were totally successful? How would I know?
- What would that success look or feel like for each of the parties with an interest?

3. Brainstorming

- What are all the things that occur to me about this? What is the current reality? What do I know? What do I not know? What ought I consider? What haven't I considered? Etc. (See Project Planning Trigger List.)
- Be complete, open, non-judgmental, and resist critical analysis.
- View from all sides.

4. Organizing

- Identify components (sub-projects), sequences, and/or priorities.
- What needs to happen to make the whole thing happen?
- Create outlines, bulleted lists, or organizing charts, as needed for review and control.

5. Next Actions

- Determine next actions on current independent components. (What should be done next, and who will do it?)
- If more planning is required, determine the next action to get that to happen.

Shift the level of focus on the project as follows if needed:

If your project needs more clarity, raise the level of your focus. If your project needs more to be happening, lower the level of your focus.

How much planning is required?

If the project is off your mind, planning is sufficient. If it's still on your mind, then more is needed.

Project Planning Trigger List

Resources

Whose input do you need?
Whose input could you use?
Has anything like this been done before?
What mistakes can you learn from?
What successes can you learn from?
What resources do you have?
What resources might you need?

Executive issues

How does this relate to the strategic plan?
How does it relate to other priorities, directions, goals?
How will this affect your competitive position?

Administration

Who's accountable for this project's success?
Lines of communication
Methods of reporting
What structures do you need?
What planning is still likely to be required?
What re-grouping will you need? How often?
What people do you need?
Current staffing?
Hiring?
Subcontractors, consultants?
How do you get involvement?
What skills are required?
Who needs to know how to do what?
What training do you need?
How do you get it?
What other communication do you need?
Who needs to be informed as you go along?
What policies/procedures are affected?
What about morale? Fun?

Finance

What will this cost?
How do you get it?
What might affect the cost?
Might you need additional \$?
What are the potential payoffs (\$)??
Who signs the checks?

Operations

What is the timing?
Hard deadlines?
What might affect timing?
Who's going to do the work?
How do you ensure complete delivery?

Quality

How will you monitor the progress?
How will you know if the project is on course?
What data do you need, when?
What reports, to whom, when?

Politics

Whose buy-in do you need?
How can you get it?

Stakeholders - Considerations?

Board
Stockholders
Employees
Vendors
Customers
Community

Legal

Issues?
Regulations?

Space/Facilities/Equipment

What requires room?
How do you get it?
What tools do you need? When?
Phones/Computers

Research

What might you need to know?

Public Relations

Is there value in others knowing about this?
How do you do that?

Risks

What could happen?
Could you handle it?

Creative thinking...

Who would have concern about the success of this project?
What would they say, ask, or input, that you haven't yet?
What's the worst idea you can imagine about doing this project?
(What is therefore the best idea which is its opposite?)
What is the most outrageous thing you can think of, about this project?
What would make this project particularly unique?
What haven't you asked yourself about this yet?

Mastering Workflow - The Five Phases

1. Collect

- Capture anything and everything that has your attention in leakproof external “buckets” (your in-baskets, email, notebooks, voice mail etc.) - get them out of your short-term memory. (Use the Incompletion Trigger Lists to keep yourself “downloaded.”)
- Have as few of these collectors as you can, and as many as you need.
- Empty them regularly, by processing and organizing (below).

2. Process

- Process the items you have collected (decide what each thing means, specifically).
- If it is not actionable - toss it, “tickle” it for possible later action, or file it as reference.
- If it is actionable - decide the very next physical action, which you do (if less than two minutes), delegate (and track on “waiting for” list), or defer (put on an action reminder list or in an action folder). If one action will not close the loop, then identify the commitment as a “project” and put it on a reminder list of projects.

3. Organize

- Group the results of processing your input into appropriately retrievable and reviewable categories.

The four key action categories are:

Projects - (projects you have a commitment to finish)

Calendar - (actions that must occur on a specific day or time)

Next Actions - (actions to be done as soon as possible)

Waiting For - (projects and actions others are supposed to be doing, which you care about)

- Add sub-categories of these lists if it makes them easier to use (Calls, Errands, At Home, At Computer, etc.).
- Add lists of longer horizon goals and values that influence you.
- Add checklists that may be useful as needed (job description, event trigger lists, org charts, etc.).
- Maintain a general reference filing system for information and materials that have no action, but which need to be retrievable.
- Maintain an “on-hold” system for triggers of possible actions at later dates (someday/maybe lists, calendar, tickler).
- Maintain support information files for projects as needed (can be kept in reference system or in pending area).

4. Review

- Review calendar and action lists daily (or whenever you could possibly do any of them).
- Conduct a customized weekly review to get clean, get current, and get creative (see Weekly Review).
- Review the longer-horizon lists of goals, values, and visions as often as required to keep your project list complete and current.

(continued)

Mastering Workflow - The Five Phases

(continued)

5. Do

- Make choices about your actions based upon what you can do (context), how much time you have, how much energy you have, and then your priorities.
- Stay flexible by maintaining a “total life” action reminder system, always accessible for review, trusting your intuition in moment-to-moment decision-making.
- Choose to:
 - 1- do work you have previously defined or
 - 2- do ad hoc work as it appears or
 - 3- take time to define your work(You must sufficiently process and organize to trust your evaluation of the priority of the ad hoc.)
- Ensure the best intuitive choices by consistent regular focus on priorities.
 (“What is the value to me of doing X instead of doing Y?”) Revisit and recalibrate your commitments at appropriate intervals for the various levels of life and work (see Horizons of Focus):
 - **Runway** - current actions (daily)
 - **10,000 level** - current projects (weekly)
 - **20,000 level** - current responsibilities (monthly)
 - **30,000 level** - 1-2 year goals (quarterly)
 - **40,000 level** - 3-5 year goals (annually)
 - **50,000 level** - career, purpose, lifestyle (annually +)

The Weekly Review

GET CLEAR

Collect Loose Papers and Materials

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

Get "IN" to Zero

Process completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and e-mails.

Empty Your Head

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

GET CURRENT

Review Action 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 & 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

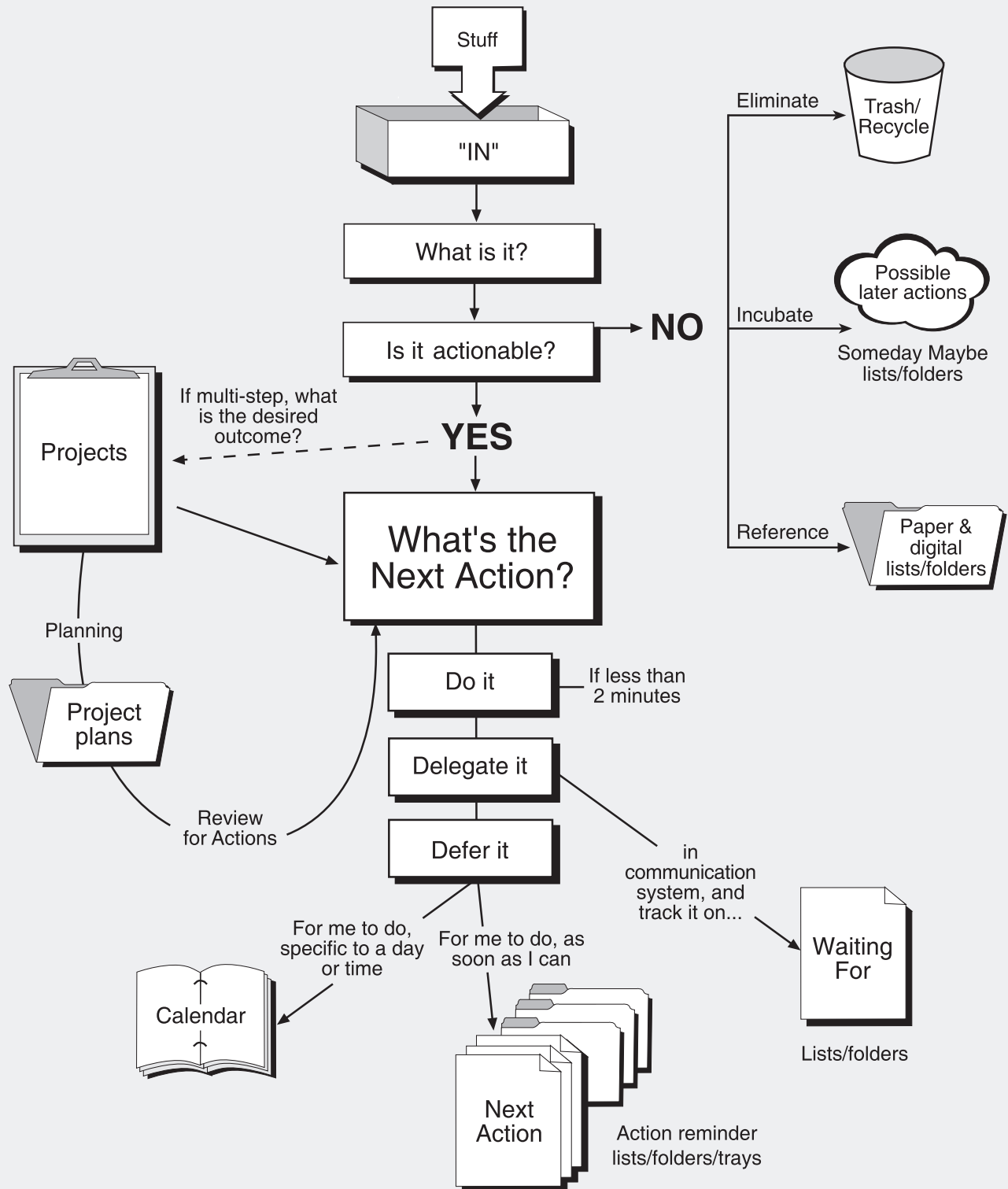
Review Someday/Maybe List

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???

Workflow Processing & Organizing



Horizons of Focus

The Altitude Map

“Work” is defined and managed from at least six different horizons, corresponding to different altitudes of perspective. These range from core intention - the understanding of the purpose and values of an undertaking, enterprise, or life - to the most mundane - the next physical actions required to move them forward. Clarity is enhanced and distraction reduced when the multiple levels with which you are engaged have been assessed and the commitments emerging from each one have been appropriately identified, captured, and implemented. Alignment of the various levels produces maximum productivity.

Priorities are determined from the top down - i.e. your purpose and values will drive your vision of the purpose being fulfilled, which will create goals and objectives, which will frame areas of focus and responsibility. All of those will generate projects which will require actions to get them done. Each horizon is equally important to clarify, however, to get things done, and the content of your thinking and commitments will be different on each level. A key driver for your life may be to assist others in achieving their dreams (purpose), which you will express by becoming a world-class athlete and spokesperson (vision), for which you will achieve a starting line-up position on a national team (goal). To do all this you need to maintain a rigorous training program (area of focus). You realize you want to get a new personal trainer (project), for which you need to call your college coach (next action) to get his recommendation.

An altitude map can be used to identify which conversation, at what horizon, with yourself and others, might have the most value, at any point in time. It could be at any level or include a combination of them. You may know the long-term goal but have yet to identify the projects needed. You may know the vision but not the actions and who's doing them. Etcetera. Keeping your thinking current at all horizons is a dynamic process - as your world and your awareness of it change, so must these arenas of your focus be continually updated.

Following is a generalized list of the levels of focus, with typical formats and suggested frequencies of visitation. (Samples given from a hypothetical business - Gracie's Gardens)

50,000 level - Purpose and core values. Ultimate intention for something, and the standards for its success.

Why are we doing this? What are the critical behaviors?

Formats: Off-sites with partners, board, team, family; initial discussions for launching projects, meetings, whole enterprises; life planning

Frequency: Whenever additional clarity, direction, alignment, and motivation are needed

(Gracie's Gardens: "Provide the highest-quality landscape and garden materials to delighted retail and wholesale customers;" "Strong and lasting customer relations; environmentally friendly products; well-supported staff," etc.)

40,000 level – Vision. What it will look, sound, feel like with successful implementation. Long-term outcomes and ideal scenarios.

Formats: Off-sites with partners, board, team, family; initial discussions for launching projects, meetings, whole enterprises; life planning; annual revisiting of enterprise direction; ideal scene development; personal treasure maps

Frequency: Whenever additional clarity, direction, alignment, and motivation are needed

(Gracie's Gardens: "Recognized as the #1 garden and landscaping store in the tri-county district; a fun, interesting, creative, informative place to browse and shop, attracting discriminating clientele who love to spend time and money on an on-going basis;" etc.)

(continued)

Horizons of Focus

(continued)

30,000 level – Goals and objectives. What do we want and need to accomplish, specifically, within the next 12-24 months, to make the vision happen?

Formats: Off-sites with partners, board, team, family; strategic planning; annual goal-setting and broad planning sessions; life and family planning

Frequency: Annually; quarterly reviews and recalibrations

(Gracie's Gardens: "By year-end, 15% sales growth, 20% profitability, wholesale business established and in the black," etc.)

20,000 level – Areas of focus and responsibility. Important spheres of work and life to be maintained at standards to "keep the engines running."

Formats: Job descriptions; organization charts; employee manuals; personal lifestyle checklists; family responsibility designations; project checklists

Frequency: Performance reviews; monthly personal check-in's; whenever job or life changes require reassessment of responsibilities

(Gracie's Gardens: "Executive, administration, PR/marketing, sales, finance, wholesale operations, retail operations," etc.)

10,000 level – Projects. Outcomes we want to achieve that require more than one action and which can be completed within a year.

Formats: Overview list of all projects; project plans (defined sub-projects)

Frequency: Weekly review; whenever next-action contents are not current

(Gracie's Gardens: "Set up wholesale division, get the books current, hire Director of Marketing, finalize Acme contract, upgrade HVAC system," etc.)

Runway – Actions. Next physical, visible actions to take on any project or other outcome; any single action to take about anything.

Formats: Calendar, action lists (e.g. calls, errands, at home, at office, talk to boss about...); action folders or bins (e.g. read review, bills to pay)

Frequency: Multiple times daily; whenever a question about what to do next

(Gracie's Gardens: "Draft plan for wholesale division, e-mail Sandy re: bookkeeper recommendations, call Brandon re: lunch meeting, review Acme purchasing history, surf web for competition ads" etc.)



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