



GOOGLE® APPS FOR DESKTOP

Setup Guide

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FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD[®] system using the built-in applications available from Google, formerly called Google Apps and now called G Suite.

This Guide covers four components of a GTD system and the Google Apps we recommend:

Email Gmail

Calendar Google Calendar

Project & Next Actions Lists Google Tasks, Google Keep, or Google Drive

Reference Google Tasks, Google Keep, or Google Drive

This Guide does not include the new Inbox by Google, as we do not find it as supportive for a successful implementation of GTD as the native Gmail app.

If you are new to Google desktop apps, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity. If you have already established your system using Google Apps, use this Guide to fine-tune or simplify your system and discover where you have under used features or overcomplicated your setup.

Don't worry about using every feature in your Google Apps. There is likely far more built in than you will ever need. Focus on what makes a difference for you. It's important to not overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

This Guide does not focus on all of the technical aspects of Google, particularly syncing. There are simply too many variables for us to fairly and adequately address every user's needs. Google, your handheld device technical support, or your IT department will be your best resources for that.

The primary focus of this guide is about applying GTD to the applications available from Google Apps now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

OK...let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Google Apps as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done[®] approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the ground breaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE PHASES OF MASTERING WORKFLOW

- **Capture** Collect anything and everything that's grabbing your attention
- **Clarify** Define actionable things into concrete next steps and successful outcomes
- **Organize** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it
- **Reflect** Step back to review and update your system regularly
- **Engage** Make trusted choices about what to do in any given moment

THREE STAGES TO INTEGRATING GTD

1. UNDERSTANDING You understand the distinct differences in the five phases of mastering workflow. You understand a project versus a next action. You know how to transform what you've captured by asking the key clarifying questions clarifying what something is and what you want to do about it.

2. IMPLEMENTATION You have installed at least the basic gear to support a GTD system, including ubiquitous capture tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.

3. BEHAVIOR CHANGE The five phases of mastering workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.” This Guide will leap forward to the Implementation stage, by configuring Google Apps as organizing tools for your projects, actions, and reference. Success at the Implementation stage depends on your understanding of GTD.

If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the Understanding stage. It's tempting to dive right into Implementation, but the Understanding phase ensures you'll have a firm grasp of the “why” of GTD.

¹ *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers or at gettingthingsdone.com

APPLYING GTD TO GOOGLE APPS

PROJECTS AND NEXT ACTIONS

OPTIONS FOR ORGANIZING PROJECTS AND NEXT ACTIONS

You have several options for organizing your project and Next Actions lists in Google Apps: Google Tasks, Google Keep, or Google Drive. This Guide focuses primarily on Google Tasks, because it is closely integrated with Gmail. Google Keep is an interesting option to consider as well, and we share tips for setting up Keep at the end of this section. In the Reference section of this Guide we talk more about Google Drive. We encourage you to experiment with all three to see which is the best fit for you.

We recommend you customize the categories in Tasks to match the set of lists recommended in the *Getting Things Done* book, which we will describe in more detail over the following pages. With our method, categories will become your working “lists.”

THE MOST COMMON GTD LISTS

There are 10 lists recommended in the *Getting Things Done* book that are a good starter set for most people.

Next Action Lists:

- | | |
|-------------|----------------|
| 1. Agendas | 5. Errands |
| 2. Anywhere | 6. Home |
| 3. Calls | 7. Office |
| 4. Computer | 8. Waiting For |

Incubation List:

9. Someday/Maybe

Outcomes List:

10. Projects

Sorting your next actions by context (lists 1–8) is recommended, because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don’t want to see (and have to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done. We’ll most commonly refer to these as “Next Actions.”

Alternatively, you could group your next actions into one list called Next Actions, instead of sorting by context. Give the context-grouped lists a try if the concept is new to you. You might find it’s surprisingly effective and easy to maintain.

Once you have completed the action or waiting for, the @Action or @Action Support label would be removed and the email can then be deleted, filed for reference under a project or topic label, or archived.

You can update your labels when you complete the action or include this in your Weekly Review cleanup.

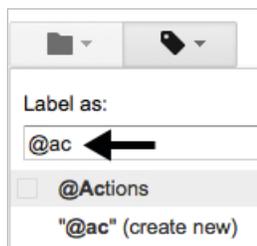
If you're not sure which option (One or Two described above) for managing actionable email is best for you, choose either to start and try it consistently for a few weeks to build productive new habits. If you find it's not working, try the other option. Whichever option you choose, work it consistently for a few weeks before giving up on it. You'll learn in that time whether it's going to be a fit for you and your workflow.

Create either the @Action and @Waiting For or @Action Support and @Waiting For Support labels in Gmail now.

NOTE: The key with either option is that you never label an email that has a current Next Action or Waiting For with only a project or topic label as your sole reminder. Doing that forces you to dig through many emails to find your current actions. As long as the email is a pending action, it would get assigned @Actions/@Waiting For or @Action Support/@Waiting For Support until you complete the Task.

HOW TO ASSIGN LABELS TO AN ACTIONABLE EMAIL

1. From within an open email, **type the keyboard shortcut L**, or click on the Labels icon  to bring up the Labels menu. (Be sure shortcuts are turned on in Settings for this to work.)
2. **Type the first few characters of the label name** to choose it from the list, or manually go to the label using your arrow keys on your keyboard.



If the label does not already exist, type the name of the desired label into the blank field and select the (create new) option.

Add as many labels as you need for the email. When you are done assigning labels, type the keyboard shortcut E, or click on the Archive icon  to Archive the email. Archiving simply means it removes the Inbox label (which was automatically added when the email arrived in your inbox). The email will be moved out of the Inbox and only appear under the Labels you assigned to it. If you Archive an email without assigning any labels, it will only appear under the All Mail view:



TIP: When composing a new message where you need to track a response, assign it to @Waiting For label before you send it. Click ▼ at the bottom of the New Message window, select Label, then @Waiting For. This saves you remembering to open Sent Mail and assigning the @Waiting For label after you've sent the message.

You can also drag a label from the label list at the left and drop it on a message in the inbox (or currently displayed selection) to quickly apply it.

CONCLUSION

ADDITIONAL RESOURCES

We hope you find this Guide to be a useful resource in your GTD implementation. Please visit our website to take advantage of the many support tools and services available to assist you in getting your GTD system up and running.

GTD Connect[®], our online learning center, offers regular webinars with David Allen and the Coaches on a wide-range of GTD topics (such as Guided GTD Weekly Reviews, Managing Email, and Keys to Getting Things Done), community discussion forums for sharing with GTD enthusiasts around the world, and a huge GTD multimedia library to assist you in your implementation.

We wish you all the best in your journey with GTD!

PLEASE CONTACT GOOGLE FOR TECHNICAL SUPPORT WITH GOOGLE APPLICATIONS:

<https://support.google.com>

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FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

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