gtd®

Todoist®

Setup Guide

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UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Todoist 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 groundbreaking work-life management system and bestselling book[1] by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS 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 steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing 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 your GTD practice, including ubiquitous collection 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 steps 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 Todoist as an organizing tool 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.

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

APPLYING GTD TO TODOIST®

PROJECTS AND NEXT ACTIONS

USING TODOIST TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Todoist is an excellent option for managing the Projects, Next Actions, and Waiting For lists in your system. We recommend you create lists in Todoist to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

Here are the 10 lists that are a good starter set for most people:

1. Agendas
2. Anywhere
3. Calls
4. Computer
5. Errands
6. Home
7. Office
8. Waiting For
9. Someday/Maybe
10. Projects

Sorting your next actions by context (lists 1–7 above) 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 be seeing (and having 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.

SETTING UP LISTS

Let's set up the 10 suggested lists in a PC, Mac, or web version of Todoist now. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

You may find it easier to do this initial setup on your desktop device and not your mobile device.

While there are a number of ways one could set up Todoist, there is one method, in particular, we have found to work well for all users of Todoist, which is to use the "Projects" area for all lists (available to Free, Premium, or Business users). We found this method to be simple and easy to use, and it takes advantage of a feature that allows emailing tasks directly to your lists. On page 21 we explore other, more complex methods (such as using Labels for contexts instead of the Projects area) if you want to experiment with your setup. We recommend reading ahead to page 21 before starting your setup, so you have a good overview of what's possible.

USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Todoist offers many shortcut keys for common functions in the app. Shortcuts will vary by platform, so check out the shortcuts for your version of Todoist here. You can even customize a few of them under Todoist > Preferences. Here is a short list of the most common ones:

Add a Label: @

Add a Project (or assign to list if you are using the setup we suggest at the beginning of this Guide): #

Quick Add inside the app: q

Quick Add using menu-bar icon: Shift + Command + A on Mac or Ctrl + Alt + A on Windows

USING SIRI

If you're an iPhone user on at least iOS 11, you can use Siri to add new and view existing items in Todoist. For more instructions and examples on using Siri with Todoist, view the helpful support doc on the Todoist website. Now, we'll go into greater detail about what goes on these lists.

EXPLANATION OF THE COMMON GTD LISTS

AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your "Calls" list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

To create an agenda for a particular person, click on the Agendas list and click the Add Task button.


Or, use the keyboard shortcut "q" to create a new list entry (what Todoist calls a Task). Click here for a full list of Todoist keyboard shortcuts.

Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). For example:

Or, another way to do this is to create new entries and nest them as indented child entries, by dragging and dropping them under the related parent entry. For example:
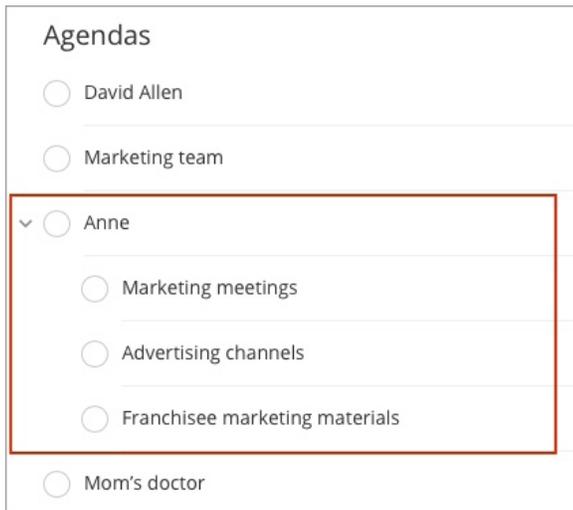
Coaching on nesting and sub-tasks:

Keep it simple, clean, and current. One of the most common things our coaches see is out of control systems caused by confusing and overcomplicated list structures using features like nesting and sub-tasks.

Another common use of the Comment feature is when you are sharing your Todoist entries with others and want them to be able to comment on the content. We talk more about collaboration and sharing later in the Guide.

You could easily have half a dozen people and meetings that you are tracking through Agenda lists—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.


Again, you can also change the order of any of your list entries by dragging and dropping the entry to a new position within the list.

LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data "project support," and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management.

Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you at the moment? You probably chose to avoid it and do something else, especially if you knew there was still thinking to do on next actions in the project materials.

When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action. You can always add a keyword for the project in your next action or waiting for description. That way, you can rely on the powerful Todoist search function in the top middle of Todoist, use the shortcut keys (/) or (f) or (ctrl f in Windows 10) to pull together related information. For example, if you wanted to pull together everything related to the "Yosemite" project, searching on that keyword will show you the results of all entries that include that word.
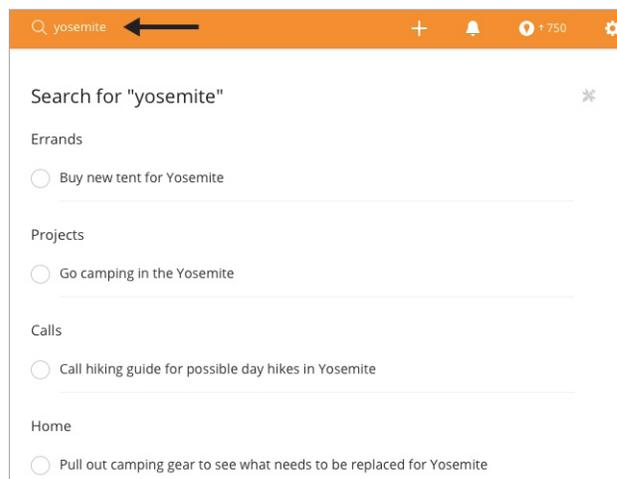
USING LABELS

If you are a Premium or Business user, you can also use labels for a specific project and search on that label. For example, you could label the project, and all of the related next action and waiting for items. Then, when you search on that label, you can see everything related to the project in one quick view.

To add a label to an entry, type the label name in the subject line, starting with the "@" symbol. If the label does not currently exist, you will be prompted to add the new label.
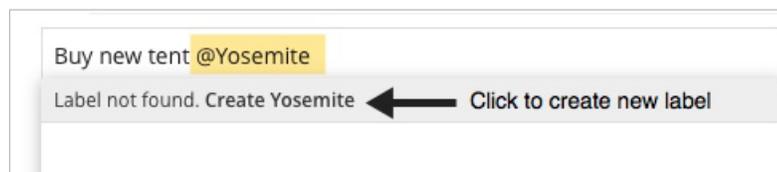
If the label does exist, typing the @ symbol and the first letter of the label will display your list of existing labels to choose from. Select the correct label and then save the entry.
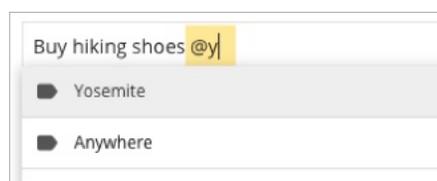
If you are a Free user, these are your only options. If you are a Premium or Business user, you can customize these to suit your needs. Todoist offers an extensive list of available Filters to create on their website.

Some users like to create filters for specific projects. While this is possible for Premium or Business users, we found using the keyword search to pull project data together much simpler and easier than customizing Filters.

OTHER WAYS TO SET UP LISTS IN TODOIST

The method we've shown for managing lists up to this point (beginning on page 6) is simple, easy to maintain, and will work for Free, Premium, or Business users. However, it's not the only way to set up lists in Todoist.

The next few pages describe an alternate way to consider structuring your lists if you're a Premium or Business user and have more features available to you.

USE PROJECTS VIEW FOR EACH PROJECT AND USE LABELS FOR NEXT ACTION CONTEXTS:
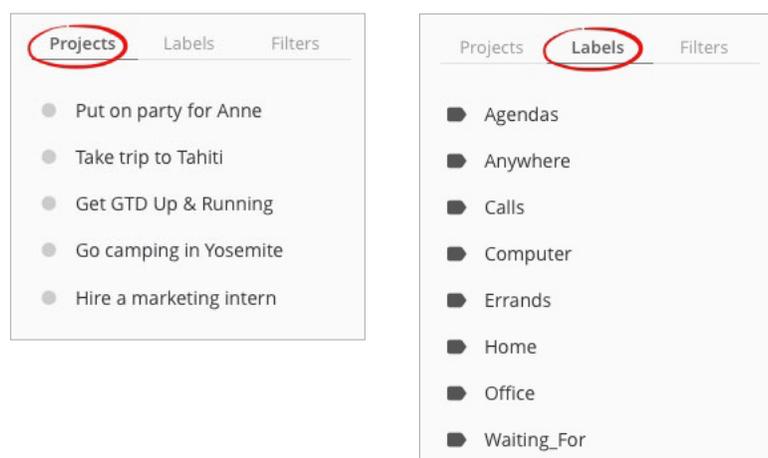
With this method, because it incorrectly assumes all next actions are related to a project, you will also need to create a fake project called "---" or "Single Actions" to represent one and done actions that are not related to a project, so that you can move it out of the Inbox. Otherwise, it can't be moved from the Inbox, and it will note the related project name as "Inbox."

There are three ways to create a new action related to a project using this method:

1. Go to the project name in the Projects view and click [+ Add Task].

2. Use the keyboard shortcut "q" from the Projects view to bring up Quick Add box. Assign a Label by typing @ and using your arrow and enter keys to select the correct list. Assign a project by typing # and using your arrow and

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

### OPTION ONE: Use The Email As The Reminder

Create @Action and @Waiting For folders in your email program and use them as an action list. You would not also put those reminders on your calendar, or Next Actions or Waiting For lists in Todoist—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.

📁 @ACTION
📁 @WAITING FOR

People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about emails you've already processed if the next action is not apparent in the subject line.

OPTION TWO: Use Lists in Todoist or Your Calendar as the Action Reminder

Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your calendar, Next Actions, or Waiting For lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your calendar, Next Actions, or Waiting For lists. It's one less place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.

📁 @ACTION SUPPORT
📁 @WAITING FOR SUPPORT
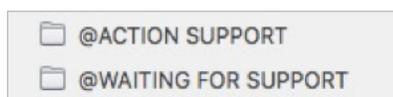
People often like this second option because all of your reminders will be tracked in as few places as possible.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

FORWARDING ACTIONABLE EMAILS TO TODOIST LISTS

If you are a Premium or Business user and find Option Two described above is a good match for your workflow, you can also use the Email tasks to a project (i.e., lists) option. Each of your items (lists or projects) in the Projects view have a unique email address associated with them. We touched on this feature earlier in the Inbox section on page 31.

Add each project's/list's unique email address to your address book now. You can find the address for each to the right of the list and choose Email tasks to this project. (Again, Todoist is calling these projects, but if you have set up lists as we recommend at the start of the guide, these are your lists.)

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD practice up and running.

For technical support with Todoist, please visit:

Todoist.com

For more information about GTD, please visit:

gettingthingsdone.com
gtdconnect.com