GTD®
AND
BlackBerry®

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A smarter way to work & live®
1 The Essentials of GTD® and BlackBerry®

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What this Guide will do for you

While this Guide is full of many great GTD tips for effectively managing your workflow on the BlackBerry, your handheld is only one small part of your productivity. For many people, always-on handheld devices have made the stress they feel from not handling their email effectively, even worse. Now you can be reminded 24/7 of what’s not getting done and how much backlog you have! And, the emergency scan habit people have gotten into is not processing email—it’s scanning email and opening a loop of attention on that email that won’t be closed until you actually process and organize it (or do it) to completion.

Having more access to email doesn’t solve that productivity problem. You need to trust you will actually process to completion either on your BlackBerry or back at your desktop, in order to get any benefit here. If you don’t trust your practices for managing email at your desk, ala GTD, you will invariably find yourself wrapped up in your BlackBerry email processing in sub-optimal ways.

This Setup Guide will share the essentials of how to make your BlackBerry a great portable solution for your GTD action management system. This Guide is not a replacement for your BlackBerry User Manual (yes, you should still probably read that tool) or for our core curriculum for learning GTD, (such as the Getting Things Done book, a GTD seminar, or coaching). But you will no doubt learn some great tips, tricks and productivity principles to get the most out of your BlackBerry.

This Guide covers 4 primary areas of the BlackBerry related to GTD:

- Managing Email
- Working with Tasks
- Managing your Calendar
- Using the MemoPad

While there are certainly other useful and fun features, we want to focus primarily on the ones you will use in your action management system.

What you will do on your desktop

Some of the setup suggestions, like setting up all of the recommended Task categories, will be easier to do on your desktop rather than on the BlackBerry. Since we do not know which desktop tool you will be syncing to, you’ll have to make a judgment call for yourself on how that would be best handled. If you need instructions for configuring your desktop application for GTD, be sure to check out our GTD Setup Guides for Lotus Notes and Microsoft Outlook at www.davidco.com/store.
About the version of BlackBerry shown in this guide

This Guide is based on BlackBerry 5.0 operating system, using a BlackBerry Tour model 9630. With the abundance of BlackBerry devices available spanning different models, wireless carriers, and operating systems, you will find differences in some of the instructions we provide with how your BlackBerry appears. We’ve done our best to describe the function of the instruction, so you can easily adapt that to how your BlackBerry is designed. Unfortunately, it’s unrealistic to write a Guide like this for every potential operating system, model and wireless carrier version. If something does not work the same for you please refer to the manual for your specific BlackBerry device.

What to know about syncing

There may be instances where something shown in this Guide is not available on your BlackBerry. A common reason, besides differences in BlackBerry operating systems, is that your syncing settings are restricted or not enabled. This is best addressed through your IT department (if you are on BES/BlackBerry Enterprise Service syncing through your company servers), or BlackBerry Desktop Software (if you are on BIS/BlackBerry Internet Service if you are syncing email through your wireless carrier), to learn your options. If you do not sync email through your corporate BES servers at all and use the BlackBerry Desktop Software instead, you would change your syncing settings through that application. If you are not sure what your options are, the BlackBerry Support website is an excellent resource.

Ideally, your syncing would work as follows:

- Email on your Desktop → syncs to Messages on your BlackBerry
- Tasks or To Do’s on your Desktop → syncs to Tasks on your BlackBerry
- Notes, Memos, Memo Pad or Journal on your Desktop → syncs to MemoPad on your BlackBerry
- Calendar on your Desktop → syncs to Calendar on your BlackBerry

Setting up your side “convenience” keys

It’s handy to set the side buttons on your BlackBerry (if you have them on your model) for the functions you use most often or would find beneficial to have one button away. To do this:

1. Go to the Options key from your Home screen.
2. Select Screen/Keyboard.
Managing Email

Obviously, a key feature for many people using the BlackBerry is email access. Instant access to your email can be very useful for on-the-go processing, but also takes more discipline to stay focused with how you spend your processing time.

How to not get caught in the busy trap of checking email on your BlackBerry

First, establish clear guidelines with those around you about how often and how quickly you will reply.
Just because it landed in your BlackBerry doesn’t mean you need to process it any faster or with less conscious decision making than seeing it on your desktop. If your job or life requires near instant response, that’s one thing. But if you or others have imposed immediate response expectations just because you have a mobile device to read email as it comes in, you may want to revisit that.

Second, watch how often you check email needlessly.
As we mentioned in the first chapter, turning off new message notifications will boost your productivity by reducing your interruptions.

Third, learn the keys for processing email quickly.
Just as we would suggest for your desktop applications, learn the common keys and shortcuts for navigating your way around the BlackBerry.

If you have dialing from your Home Screen disabled and have a full QWERTY keyboard, the letter “M” will bring you to the Messages application.

Email shortcuts that work from within the Messaging application:
- C key to compose a message
- R key to reply to a message
- L key to reply to all to a message
- F key to forward a message
- I key to file a message
Typing the first letter(s) of an email folder goes to the first match in your folder list
- T key to move to the top of a message
- B key to move to the bottom of a message
- S key to search messages
- Del key to delete a message
- Hold Shift key to select a group of messages, then del key to delete selections
- Space bar pages down in a message
- Double clicking your trackball (if you have one) automatically creates a Reply
- Pressing your Space bar twice when addressing an email inserts the @ symbol
- Pressing Space bar twice within the body of an email inserts a period
- Highlight the date bar in the Inbox, then Menu key, for Mark Prior Open and Delete prior options
4. If you have any categories already set up to sync from your desktop application, you will see those here. To add new categories, select Menu key again, select New, and add the categories recommended below. You can delete any you are not using, but you cannot rename any on the BlackBerry. (Again, this is why this may be easier to do on your desktop, which often will allow you to rename an existing category.)

How to set up categories on your desktop

To setup categories on your desktop application, look for a categories or tagging feature in your desktop list manager—whatever is allowing you to sort your lists. If your desktop list manager does not support this, we encourage you to use one that does. Otherwise, you will have one long list of entries that will easily become overwhelming and ineffective to wade through. If you are using Outlook® or Lotus Notes® we recommend that you use the corresponding GTD Setup Guide to assist you with this in your desktop application. You can find these in our online store.

We recommend you create the following lists (categories) in your Tasks application:

Note: To view Tasks by category on your BlackBerry, select Menu, Filter and select the Category name of the list you wish to view.
Here is a brief description of the lists we recommend, along with some best practices:

**The Next Action lists**

To move things forward, you must decide the next action required. If you don’t do the action in the moment, or delegate it to someone else, you need to keep track of it as a reminder for yourself to take action later. The best practice for organizing these reminders is to sort them by the context (i.e., the categories you just created) needed for the action. Does it require a phone? A computer? Do you have to be at home to do it? Do you need to be “out and about” doing errands? Our recommended categories are the most common contexts, and have proven to work well for most people who have implemented GTD.

**Agendas** – This category lists the separate people you will be communicating with in real time (face to face or on the phone) and meetings coming toward you, for which you are collecting things to talk about when you are there, and perhaps to place on an agenda beforehand.

Using the Task dialog, create a separate Task for each person you interact with regularly (boss, spouse, assistant, direct reports, consultants, coaches, team meetings, etc.) with the name in the “Subject” line. Within the Task, the notes box is a great place for collecting the separate agenda items or talking points to go over with them the next time you meet in person or on the phone.

Many times the next action on a project is to talk to someone when you are with them, and creating a Task specific to this person provides a perfect “parking lot” for your agenda items until they are communicated. You will need to select and delete these items in the Notes field when they are no longer current.

Lists like these are very handy to keep with you at all times, in case you interact with these people or think of something to talk to them about. It is also easy to print out a single list if you want to walk into the meeting with hard copy for note taking.

You could easily have fifteen or twenty people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

If you have one very key person in your world, with whom you are constantly in touch with about many different things, it might make sense to create another Task category for just that person’s agenda items. In other words, if your boss is Paul, and much of your job consists of back and forth communications with him, consider creating a Paul category. Then you can enter items to talk with her about as separate Tasks, categorized as Paul, just like Calls or Computer.