gtd®

THINGS®

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Things® 3 on your Mac desktop for your GTD® workflow. The Guide is packed with our best practices for configuring and populating Things for your Projects, Next Actions, Waiting For, Someday/Maybe, and Reference lists. We'll also cover strategies for managing your calendar and email.

If you are new to Things, this Guide is an excellent starting point for you to build a solid GTD foundation for optimizing your productivity. If you already have an established system in Things, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

This is not a technical Guide, nor will it cover all the instructions for how to use Things. We'll leave that to the folks at Things to share with you through their excellent support material.

There are many ways you could configure Things for GTD. This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Things. Even with your lists managed in Things, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like Things, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. 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.

Don't worry about using every available feature in Things (or any of your tools for that matter). There may be more offered than you will ever need. Focus on what makes a difference for you.

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 Things 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 Things 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.

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

APPLYING GTD TO THINGS®

SETTING UP THINGS FOR GTD

USING THINGS TO MANAGE YOUR KEY LISTS

Things is an excellent option for managing the Projects, Next Actions, Waiting For, and Someday/Maybe lists in your system. We appreciate the simplicity and flexibility of this tool for implementing GTD. We suggest you create lists in Things 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 the office, 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.

Let's set up the 10 suggested lists in Things 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.

We recommend doing this initial setup on your desktop and not your mobile device.

While there are a number of ways one could set up Things, there is one method, in particular, we have found to work well for many users of Things, which is:

• Setup all lists using "Projects" type of entry.

• For additional sorting into topic folders, create "Areas".

• Use Tags, if needed and sparingly, for areas of focus, linking key projects to their related actions, or specific topics.

Things is so elegantly functional for GTD, if you simply started by setting up all of your lists as Project entries (and didn't dive into using Areas or Tags,) you would have a very functional system by our standards!

First, let's use "Project" entries in Things to manage all of your lists. You'll need to get creative in your thinking and essentially ignore that this is called "Projects." Think of it as simply your "lists" area.
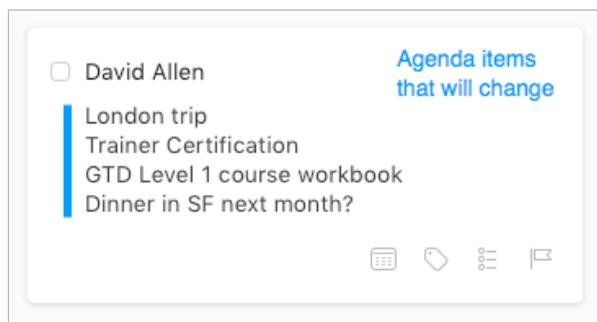
We've entered the agenda items in the example above as simple text notes. Things also offers a more linear approach to this Notes field through checklists. To create a checklist within the Notes field, click the checklist icon ⋮☰ and start typing your list.

The advantage of a checklist is that you can mark an item complete. It stays in the Notes field grayed out. This could be useful if you ever need to retrieve older agenda topics.
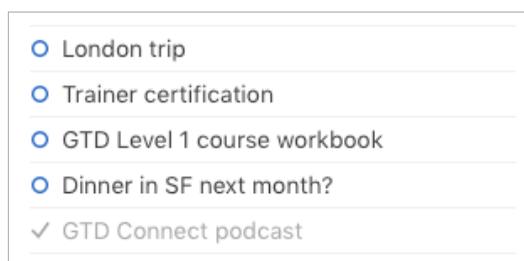

There is no icon or built-in Things feature for adding files to the Notes filed. However, you can open Finder and drag a file to the Notes field to create a shortcut back to it on your computer. To do this, open Finder, file the file you want to link, and drag it over to the Notes field in the Things entry you want to add it to.

To move text or a checklist item in the Notes field to another list, simply highlight the item with your mouse and drag it to the new list. For example, if you decided to email David about "Dinner in SF next month?," highlight the item and drag it to the Computer list. Add a verb to define your next action.
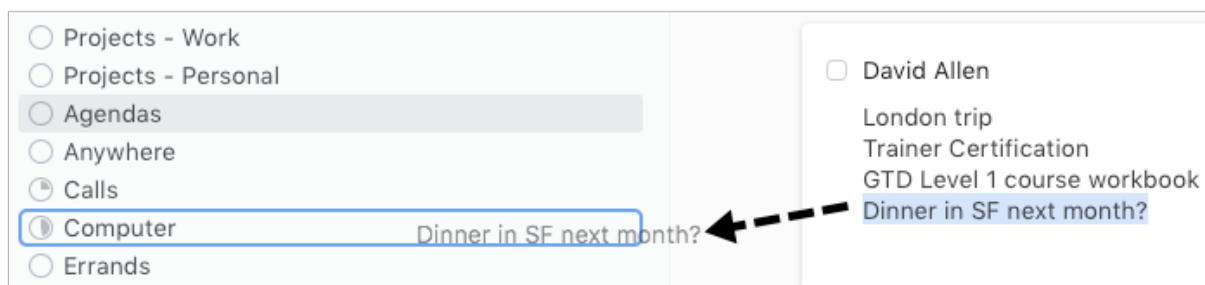
Type the first few letters of the tag name to select an existing tag, or type the full keyword if you want to create a new tag. Press enter/return to save the tag assignment.
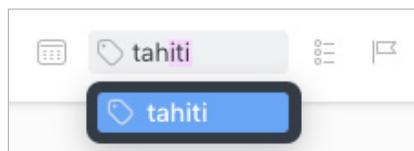

To then search on that tag, click on the tag name to see all items with tag *within that list.*
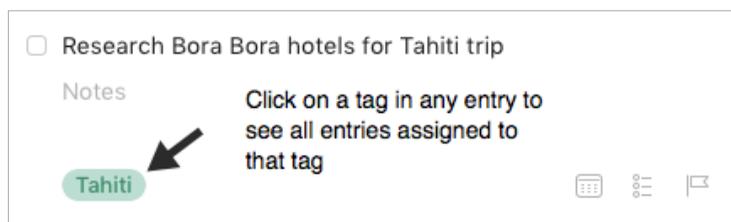
To search for all items with that tag in all lists, you will need to use Quick Find as we described earlier.

OTHER USES FOR TAGS

Other useful ways to use tags would be to link items to related people, teams, or Areas of Focus[2]. For example, if you wanted to see everything related to your Business Development Area of Focus role, because that would help drive your decisions about what to work on, you could create a tag for that.
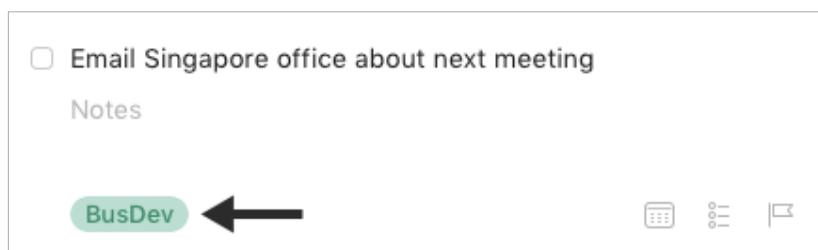
Be careful that whatever additional criteria you add for creating new entries, like creating and adding tags, do not become a burden or requirement. You may find tags useful for one entry, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it. Use tags sparingly and judiciously.

[2] See the *Getting Things Done* book or our GTD Methodology Guides in our online store for more coaching on defining your Areas of Focus.

The difference with the Inbox versus your other lists is that these items are unprocessed. You have not clarified yet what the item is or what you want to do about it. To make the Inbox work, you'll need to treat items you create there with the same rigor you would your email and paper Inboxes, meaning, process the items in this list down to zero on a regular basis.

THERE ARE A FEW WAYS TO CAPTURE INBOX ITEMS

1. Email Items to Inbox

Your Things account comes with a unique email address for emailing items directly to the Inbox. To enable this feature and find your unique address, go to Things Preferences and turn on Things Cloud. You'll need to create a free Things Cloud account, if you don't already have one. Once created, go back to Things Preferences and check off Enable "Mail to Things." Copy the address shown on that window and create it as a new contact in your email address book, such as "Things Inbox."
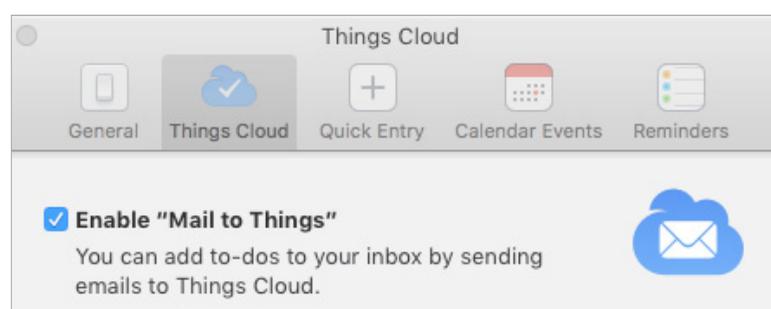
When you send emails to your Things address, the text (up to 2,000 characters and no file attachments) will be sent to your inbox. It is not possible to send items directly to others lists or add tags using Mail to Things, but it will be a fast way to send Mind Sweep items to the Inbox.

2. Use Quick Entry or go to the Inbox List to Add New Items

If you are in the Things app, you can add Inbox items by using Quick Entry (Control + Alt + Spacebar), or by going to the Inbox list directly and adding the item using the + sign, or Spacebar, or Command + N.

By default, all Quick Entry items will go to the Inbox list, unless you've changed that in Preferences or change it manually in the Quick Entry window. For example, here is a Mind Sweep item added through Quick Entry:

EMAIL

INTEGRATING ACTIONABLE EMAIL WITH THINGS

Managing email is the most difficult habit for many to change. The master key is working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis. The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in "In" as the safest place.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in this Guide) you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file[3])?

YES What's the next action?
Do now, delegate to someone else, or defer to do myself later?

Do it now   If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or on your Waiting For list in Things.

Defer it   If needing to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list.

If multiple actions, what's your desired outcome? Track that outcome on your Projects list in Things.

We recommend getting your inboxes to zero daily, or at least once a week in your Weekly Review.

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[3] For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

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 system up and running.

FOR TECHNICAL SUPPORT WITH THINGS, PLEASE VISIT:

culturedcode.com/things

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com