



OUTLOOK[®] 2011/2016 FOR MAC[®]

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD[®] system using the built-in applications in Outlook[®] for Mac[®]. Outlook for Mac 2011 and 2016 are nearly identical, except for a few minor differences, which we will point out throughout the Guide.

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

Don't worry about using every feature in Outlook. There is likely far more built in than you will ever need. Focus on what makes a difference for you. It's important not to 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.

We should note that this Guide does not focus on all of the technical aspects of Outlook and all of the options for syncing. There are simply too many variables for us to fairly and adequately address every user's needs. A good web search, Microsoft, 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 in Outlook for Mac now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

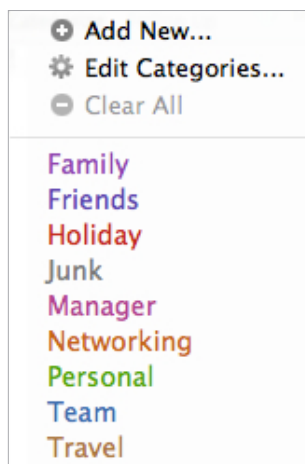
OK...let's get started!

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.

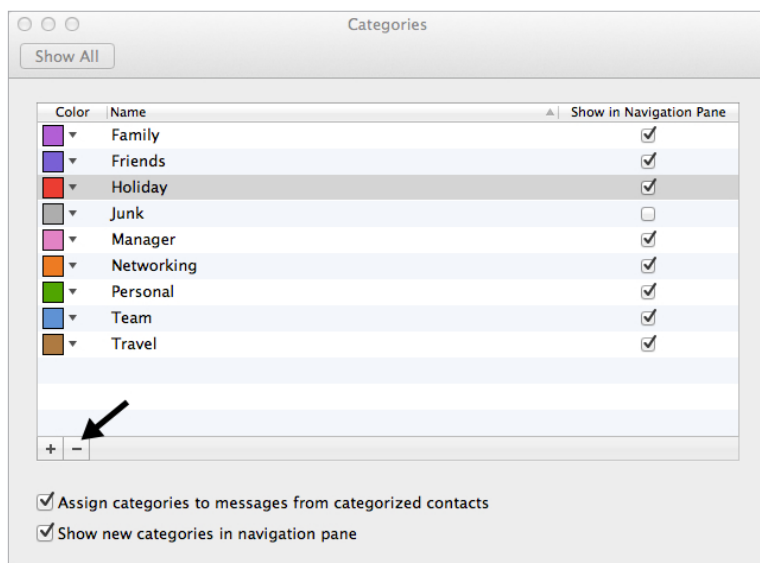
SETTING UP LISTS IN TASKS

Let's go ahead and set up the 10 suggested lists in Tasks now. You can always go back to customize these later, after you've experimented, to discover what will work best for you. We encourage you to give these lists some time, in order to see the value in sorting by context.

1. Open the Tasks Application in Outlook, through the View Switcher in the bottom left corner or the keyboard shortcut **⌘ 4**.
2. Click on the Categorize button  in the Outlook ribbon.
3. You will see the default categories Outlook provides (Family, Friends, Holiday, etc.) and any others you have created. Select Edit Categories...



Take a moment now to delete any categories you don't use or plan to use by clicking on the category name and clicking on the minus symbol. For example, deleting the Holiday category:



USING PRIORITY FLAGS

A High Priority flag can be useful if you want to have your attention go to a few select items that must be completed soon, but which are on a long list of to-dos. Like due dates, be careful not to get into the trap most people get into with priority flags, which is to use them for nearly everything. It's too easy to go numb to ALL of them when you start seeing the majority of your items screaming for your attention with a flag. If you do choose to use them, keep in mind that Priority flags are not:

- A replacement for daily reviews of your Next Action lists
- A replacement for thorough Weekly Reviews to clean up and update your lists
- Effective if they are overused to the point where you are numb to them

Now let's talk about what goes on your new lists...

EXPLANATION OF THE COMMON GTD LISTS

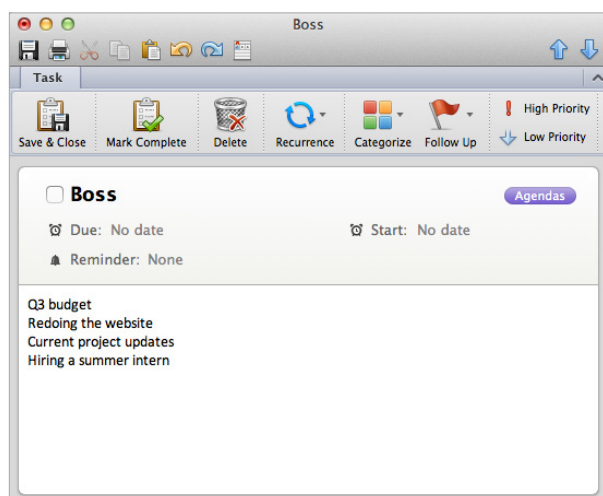
AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them.

You can create agendas two ways:

Option One: Add the person or team name in the subject line and use the note field to capture your agenda items.

With this method, you only have one agenda entry per person or team.

<input type="checkbox"/>	 Accountant	No Due Date	● Agendas
<input type="checkbox"/>	 Boss	No Due Date	● Agendas
<input type="checkbox"/>	 Marketing Team	No Due Date	● Agendas
<input type="checkbox"/>	 Spouse	No Due Date	● Agendas



The advantage with option one is that all of your agenda items are parked in one place, which can be easier to retrieve and/or print as one page before you go into a meeting.

USING THE MAIL APPLICATION TO PROCESS AND ORGANIZE EMAIL

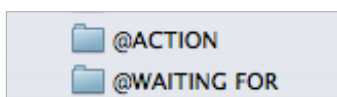
The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox. It takes less psychic effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the Weekly Review). 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 the inbox as the safest place.

Open the Mail Application in Outlook, through the View Switcher in the bottom left corner or the keyboard shortcut **⌘ 1**.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL IN OUTLOOK

OPTION ONE: USE THE EMAIL AS THE REMINDER

Create @Action and @Waiting For folders, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in Reminders—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and Calendar, for reminders of your commitments.

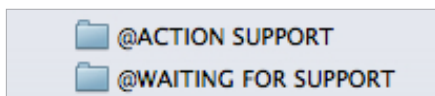


People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about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

The @ symbol is a trick to push these folders to the top of your email structure for easy access.

OPTION TWO: USE TASKS OR YOUR CALENDAR AS THE ACTION REMINDER

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



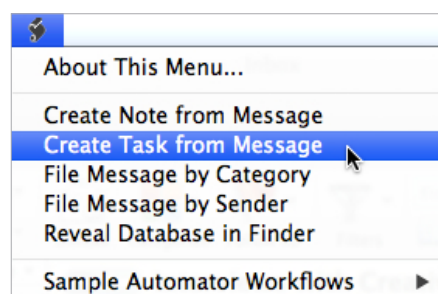
People often like this option because all of your reminders will be tracked in as few places as possible. But it does mean you have to take the time to go to Tasks and define the next action.

TURNING AN EMAIL INTO A TASK

Outlook offers a useful function to turn emails into new tasks. This will be especially useful if you opt for option two, described above. To use this feature, follow these steps.

INSTRUCTIONS FOR OUTLOOK 2011

1. Highlight the email.
2. Click on the Apple Script icon next to Help at the top of your Outlook window and select Create Task from Message from the menu.



INSTRUCTIONS FOR OUTLOOK 2016

1. Highlight the email.
2. Click Message > Create > Task in the menu. Or, click on the email and drag it over the Tasks icon in the bottom left navigation area until you see a + sign.

INSTRUCTIONS CONTINUED FOR BOTH VERSIONS

A new Task is created with a copy of the text from the email in the note field of the Task. The subject line of the task is copied from the subject line of the email. The original email is still located in the same folder you copied it from.

3. Edit the subject line to accurately reflect a project name with a clearly defined outcome, or a next action with a clearly defined verb describing your next physical, visible step.
4. Categorize the Task. Save & Close when done.
5. Go back to Mail and file or delete the email. If the email was located in your Inbox, move it the appropriate folder other than In (such as Actions, Action Support or a Project folder) if you will need the original email in the future. This is an important step, as creating a new Task from the email only copied the text of the email's contents—it is not formatted as an email you can launch from Tasks. If you will no longer need the email and only the contents of it as reference, which is now stored in the note of the Task, go ahead and delete the email.

Go ahead and create a new Task from an email to see how it works.

We hope this has been a useful overview of Mail and has given you some helpful GTD tips for being more productive!

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 OUTLOOK FOR MAC, PLEASE VISIT:

Microsoft.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com