



ASANA[®]

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Asana® for your personal GTD® workflow. This Guide will focus on configuring and populating Asana for your Projects lists and plans, Next Actions lists, Waiting For lists, and Reference.

This primary focus and purpose of this guide is to support your personal implementation. This is NOT a guide about how to use Asana with your team or how to make use of the many collaborative features in the tool.

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

We are aware that there are many features and ways to configure your system in Asana to support your GTD practice. This is not a technical Guide, nor will it cover all the features or ways to do something in Asana. We'll leave that to the Asana team to share with you through their excellent support material.

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 Asana. Even with your lists managed in Asana, you'll still have your calendar and email in other tools.

Whatever configuration you choose in tools like Asana, 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 and add-on in Asana. 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 Asana 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 book¹ 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 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 Asana 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 ASANA®

PROJECTS AND NEXT ACTIONS

USING ASANA TO MANAGE YOUR LISTS

Asana is a great choice for managing the key lists in your GTD setup. You'll find it works well for your personal lists and those you need to share with others.

THE MOST COMMON GTD LISTS

The ten lists recommend in the *Getting Things Done* book that are a good starter set for most people are:

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

1. Projects – A list of your multi-step outcomes that can be completed within one year.

2. Someday/Maybe – Potential projects and next actions you are committed to review as an option, but not committed to do.

3. Waiting For – Expected items waiting on someone or something else.

4.–10. Next Actions by context – The next physical, visible activity that progresses something toward completion. David Allen recommends 7 next action contexts to get started.

Sorting your next actions by context 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.

We'll describe each one of these lists in more detail later in the guide. For now, we just want you to understand the overall architecture and structure in Asana.

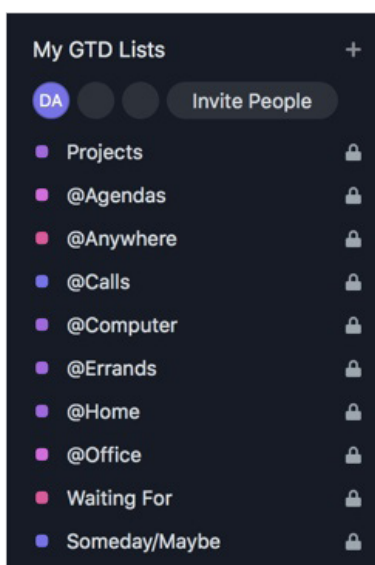
You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

SETTING UP ASANA

While there are a number of ways you can setup Asana for GTD, we have found one way in particular that we think will work well for GTD. This approach will also support the collaborative aspects of Asana, which we know is important to many people. Summary of our recommendations:

- Create a new workspace for “My GTD Lists”
- Add 10 GTD lists as new, private, blank projects using the list layout (this is key to understand, as we are using the projects area for all lists—not for individual projects)
- Use tags, only as needed, to link key projects to related next actions
- Star all GTD lists to appear in favorites

ONCE SETUP, YOUR LISTS WILL LOOK LIKE THIS IN ASANA:



Don't worry yet about what will go on these lists. We will cover that extensively after this initial setup. For now, we recommend setting up these 10 lists to create the framework for GTD.

Note: *Later in the Guide, under Customizing Asana on page 20, we offer an alternative setup, which uses the projects area for all projects and tags for all contexts. If you want to consider both options, read ahead before setting up Asana, so that you know the differences.*

SOMEDAY/MAYBE These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not.

- ✓ Move 401k investments around
- ✓ Replace website host
- ✓ Learn Italian
- ✓ Clean off old laptop and donate
- ✓ Open new office in Dubai

Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your Weekly Reviews. That should give you the freedom to capture onto this list without the stress of feeling like you've made a commitment you may not have the resources to take on.

PROJECTS The Projects list tracks any of your desired outcomes that require more than one action step to complete, which you expect to be done over the next 12 months. Projects should always have a defined endpoint.

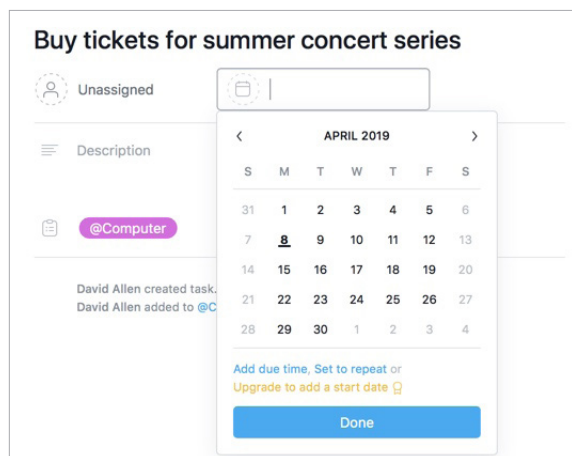
- ✓ Take trip to Tahiti
- ✓ Put on party for Dennis
- ✓ Complete taxes
- ✓ Get GTD Up & Running
- ✓ Hire new webmaster

Any notes you have about the project, also known as your project plans/project support, can be added to the Description field for each project on the list, as well as uploading relevant files. While this Description field may not be robust enough to capture all of your project details, and it may not make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and “future” actions you want to capture. The current next actions and waiting fors for the project are not tracked in this Description field but on those lists.

USING DUE DATES

We recommend using due dates judiciously. A quick way to erode trust in your system is to create a pattern of false due dates, where you are continually questioning what's a “real” versus “made up” due date, as well as spending your valuable time changing dates on overdue items you thought you would get to.

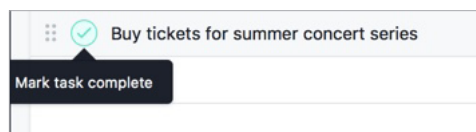
Due dates can be added to any list item by clicking on the item and selecting “due date” from the expanded menu.



MARKING ITEMS COMPLETE

Many GTD users ask if they should keep or delete completed items from their lists. If you think you'll ever want to retrieve the item, we recommend keeping it. This can be useful for year-end reviews when you want to see and acknowledge all of the projects you completed. You may find this unnecessary though for all of the next actions. Trust that you know best about what would be useful for you to keep. As David Allen says, “When in doubt, keep it. When in doubt, throw it out!” The bottom line is that either works if you are making a choice that works for you.

To mark an item complete in Asana, click the checkmark to the left of the item.



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 ASANA, PLEASE VISIT:

[Asana.com](https://asana.com)

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com