gtd®

PAPER ORGANIZERS

Setup Guide

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FOCUS OF THIS GUIDE

EXPLANATION OF HOW TO BEST USE THIS GUIDE

WHAT YOU CAN EXPECT

Our focus with this Guide is to show you how to use a paper organizer for your GTD® workflow. This Guide will focus on configuring and populating a paper organizer for your Project lists and plans, Next Actions lists, References, Calendar, Contacts, and more.

If you are new to a paper organizer, 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 a paper organizer, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

This Guide will focus 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 a paper organizer. Your "reference" information is a good example of that—it's unlikely that a paper organizer will be able to hold all of your reference materials. You will likely have online and physical filing systems for that as well.

Whatever configuration you choose for tools like a paper organizer, 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 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 hope these suggestions give you good direction for building a trusted GTD paper organizer for yourself. Have fun with this and be willing to adapt our suggestions to meet your specific needs.

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

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

To get the most out of your paper organizer 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 your paper organizer as a 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 A PAPER ORGANIZER

USING THE POWER OF A PAPER ORGANIZER FOR YOUR WORKFLOW

CHOOSING THE SUPPLIES FOR A PAPER ORGANIZER

Many paper organizers can be adapted to work as a GTD organizer. Choose a binder you like and choose forms that will allow you the greatest flexibility in how you use the page. It's important to avoid pre-printed forms that include fields, criteria, and extra information you don't need and will be visually distracting for you. Choose blank forms whenever possible and simply label them as we've described in this Guide. We also suggest you get ten tabbed dividers to serve as section breaks, for the ten suggested sections we will describe in detail in this Guide.

We offer an editable PDF organizer, designed for the GTD best practices suggested in this Guide, in our Online Store. It includes GTD forms for your Calendar, Next Actions lists, Projects, Project Support, Focus & Direction, Contacts, and more. You can edit and save our PDF forms to store in their digital format, or print pages as you wish for a physical binder. You don't need our version to build a successful paper organizer, but it's there for you as an option if you're looking for a tool that's ready to go.

However you choose to build your paper organizer, consider our suggestions as a starting point. You may find you don't need all of these sections in a paper format—particularly as some of these might be stored efficiently online for you, such as a calendar. Build what you need and be willing to adapt it along the way when you find your use and needs change.

SETTING UP THE PRIMARY SECTIONS

Though the sections are relatively simple (with no complex structures to constrain you), there is an intelligent "flow" in how the sections function and work together. We suggest you set these up in this order:

1. **Notes/In** – A trusted, portable inbox for capturing notes and ideas to clarify later.
2. **Calendar** – Holds day-specific actions, time-specific actions, and day-specific information.
3. **Next Actions Lists** – Holds all of the next physical, visible action steps to complete—related and not related to current projects.
4. **Agendas** – Holds the reminders for items to discuss with people and in meetings.
5. **Projects** – An inventory of your current outcomes that will take more than one action step to complete.
6. **Project Support** – Holds thoughts, details, plans, future actions, and miscellaneous support materials for your projects.
7. **Someday/Maybe** – Incubates items you might want to do at some point, but have no current commitment to complete.
8. **Focus & Direction** – Stores details about the higher horizons of your life, including life goals, visions, and inspirations.
9. **Reference** – Holds a wide range of non-actionable, simple reference lists and checklists.
10. **Contacts** – Captures information about key contacts you would want to have at hand.

3. NEXT ACTIONS LISTS

Your Next Actions lists hold all of the next physical, visible action steps to complete—related and not related to current projects.

This level is known as the Ground level, or "runway" in some GTD references.

This section is used for the lists of the very next actions you need to do, as soon as you have the time do. These include the next steps on projects ("Call Joe for his suggestions about a dentist") and single actions we need or want to do ("Email Daniel our pictures from Hawaii"). Because most people have dozens of these kinds of "to-dos," it is easiest to manage them on separate lists, organized by the context required for the action. In other words, if you need to be at your computer to take the action, put the reminder on a "Computer" list. If the action requires going to the hardware store, park that on an "Errands" list.

Sorting by context is not a requirement to make this Next Actions lists section work effectively, but it is our most common suggestion. If you find that they don't work as well for you, you can always sort your actions into one list called "Next Actions."

THE MOST COMMON CONTEXTS FOR ACTIONS

- Calls (from any phone)
- Computer (actions that require a computer)
- Office (requires being there)
- Home (requires being at or around your house or apartment)
- Errands (out-and-about)
- Anywhere (can do the action in any location)
- Waiting For (actions others are supposed to be doing, which you care about)

Important: Any actions that absolutely must be done on a specific day (e.g., a call that has to be made sometime on Tuesday) should be tracked on your calendar, not on these action lists. See our notes about use of the Calendar in that section. These Actions lists are essentially reminders of things that need to get done as soon as you can, after you have dealt with the "have-to" actions for today. These lists are not re-written every day—they are simply available to remind you of all the things you need to do, when you have any discretionary time.

REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones you set up based on context, such as Calls, Computer, etc.) whenever you get a chance. On a weekly basis, in your GTD Weekly Reviews, we recommend reviewing all of your actionable lists, including Next Actions lists, Waiting For, Someday Maybe, Projects, and relevant Project Support. This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each Project is moving forward. The higher horizons, described in Section 8, are reviewed at varying intervals.

MARKING ITEMS COMPLETE

When you complete something on your lists, you can put a checkmark or X next to the item, strike through it with a line, or highlight it with a pen. When you reach the end of the page, simply create a new page, and carry any remaining items over to the new page.

MAKING PRIORITY DECISIONS

Question: How do I make priority decisions?

David Allen: I have a radical point of view: learn to listen to, and trust, your heart. Or your intuition, or your gut, or the seat of your pants, or whatever part of your anatomy is the source of that mysteriously wonderful "still, small voice" that somehow knows you better than you do, and knows what's better for you, better than you do.

The "ABC" priority codes don't work. Listing your top 10 things you think have to get done, in order, doesn't work. You'll have a different priority set at 8pm than you will at 10:30 this morning. And sometimes the most strategic thing for you to do will be to water your plants. Like, when you've been in six meetings, felt beat up in five of them, and by 4:30 your brain is scrambled eggs, and you barely have the attention span of a gnat. That's the time to water your plants and fill your stapler. Why? Because you can't do anything else, and you're going to have to water your plants sometime anyway.

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