



# GTD<sup>®</sup> INSTALLATION

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Setup Guide

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# FOCUS OF THIS GUIDE

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## INTRODUCTION

This Installation Guide is designed to be a guide to help you implement the techniques and ideas that make up the Getting Things Done<sup>®</sup> methodology.

- First, it will walk you through a step-by-step process to gather the tools you need, set aside some time, and get started with this program.
- Then, the Installation Guide provides clear directions and best practices in each of the five phases of the Mastering Workflow process. With each phase, you'll be given a time estimate so that you can plan accordingly, a list of any required supplies or tools, and a checklist of steps to keep track of your progress.
- Also in this Installation Guide, you'll get handy tips and guidelines for ensuring success.

Remember that you don't need any new skills to be more productive, and you probably don't need to get a lot of new tools. What you might want, however, is a guide to step you through the process and provide some encouragement along the way. That's what this Installation Guide is intended to be.

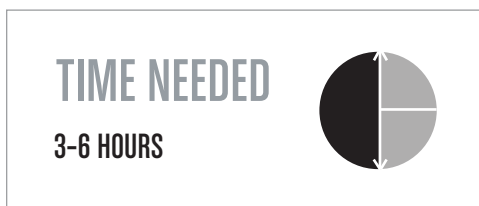
We wish you the best on your journey toward getting more done with greater ease and enjoyment!

# GETTING STARTED

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## SETTING UP THE TIME, SPACE, AND TOOLS

To get started, block off some time, set up a work area, and get some basic tools. You should also set up your general reference filing system.



## STEPS OVERVIEW

<b>1</b>	15 minutes: Set aside a block of time to implement the initial Collecting process.
<b>2</b>	1/2 hour—2 hours: Get the basic supplies you will need.
<b>3</b>	0—2 hours: Set up your work area with the furniture and equipment you will need.
<b>4</b>	2 hours: Set up your general reference filing system.

***The beginning is half of every action.***  
— Greek proverb

## STEP 1: SET ASIDE A BLOCK OF TIME

**TIME NEEDED: 15 minutes**

*Schedule some time to prepare a workstation with the right tools and implement the initial Collecting process (described in “Collecting”).*

- Schedule 2 to 3 hours to complete the Collecting process.
- Set aside 2 whole days, back to back, if you want to complete the Collecting and Processing phases at the same time. Try to schedule one block of time, rather than several chunks. This will give you a huge sense of control and accomplishment.
- At a minimum, start with a 2-hour block of time.

### TIPS: SETTING ASIDE TIME

- ***Keep in mind that collecting everything can take up to 3 hours. Processing and deciding on actions for every one of these items can take another 8 hours.***
- ***Remember that you’ll most likely only need to do this once to catch up on your backlog (depending on the volume.) Once your system is set up, you’ll be in maintenance mode.***
- ***You might not want to use “after hours” for this work, when you might have reduced energy and enthusiasm.***

## STEP 2: GET THE SUPPLIES YOU NEED

**TIME NEEDED: 1/2 hour (or 2 hours if you need to shop for them)**

*You’ll need some basic supplies to get the most out of Getting Things Done.*

### Basic Supplies

Get these basic tools and supplies:

- Paper-holding trays (at least three)
- A stack of plain paper
- A pen or pencil
- Sticky notes (3x3s)
- Paper clips
- Binder clips
- A stapler and staples
- Scotch tape
- Rubber bands
- An automatic labeler
- File folders
- A calendar
- Trash and recycle containers
- Paper shredder

## “In” Collection Tools

Get the tools you need to serve as versions of an “in”:

- Physical in-tray (plastic, wood, leather, or wire tray for collecting paper-based materials and anything else physical that needs processing)
- Paper-based note-taking devices (notepads, spiral binders, index cards, sticky notes, etc.)
- Electronic note-taking devices (computer, personal digital tool, etc.)
- Voice-recording devices (voicemail system, dictating equipment)
- Email

## STEP 3: SET UP YOUR WORK AREA

### TIME NEEDED: 0-2 hours

*You need a physical location to serve as your basic work area. If you have work stations both at home and at an office, you'll want to establish identical systems in both places. Here are the basic components for your work area. Select those you need given the type of work you do.*

- Get a dedicated workspace and make sure you have sufficient writing surface.
- Get an in-tray.

You may also need:

- A phone
- A computer
- Stacking trays
- File drawers
- Bookshelves
- If you travel extensively, set up a mobile “office in transit.”  
This can be a briefcase or bag with folders and portable supplies.

### **TIP: SETTING UP YOUR WORKSPACE**

***Don't share your work area with family members or work colleagues.***



## STEP 4: SET UP YOUR GENERAL REFERENCE FILING SYSTEM

### TIME NEEDED: 2 hours

- You will need a set of file drawers. Purchase new ones if you need to. Get high-quality mechanics. This is not the place to skimp on quality.
- Create a single alphabetical filing system, not multiple systems based on various themes.
- As you process your in-tray, create new folders as needed to file nonactionable reference material.
- Take the time to clean out your existing reference files. Purge unwanted material, replace worn folders, divide bulging files into two or three smaller files, etc.
- Create typeset labels for your folders using your labeler.
- Keep your drawers no more than 3/4 full to allow for easy access.
- Avoid cumbersome hanging files and plastic tabbed labels if possible—you must be able to make a new file quickly and easily.
- Refer to the articles in the back of this workbook for guidance on setting up a general reference filing system.

### TIPS: SETTING UP YOUR FILING SYSTEM

- *Keep general reference files within easy reach.*
- *Have plenty of fresh folders at hand.*
- *Avoid the unnecessary complication of color-coding your files.*
- *Label your files with an automatic labeler. This is faster for one-off labels than printing from your computer.*
- *Get comfortable filing even a single piece of paper that you might want to refer to later.*