gtd®

MICROSOFT® TO DO

Setup Guide

David Allen Company

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Microsoft® To Do for your GTD® workflow. This Guide will focus on configuring and populating To Do for your Project lists and plans, Next Actions lists, and Reference.

To Do works seamlessly, and is nearly identical, across the Windows desktop, Mac desktop, web (also called Cloud, Outlook.com, or Microsoft 365 version), and mobile. You may be using To Do as a stand-alone application on your desktop or inside of Outlook web version. For simplicity, this Guide will support all users. The screenshots will be of the web version and we have noted if there is a difference on Windows or Mac.

If you are new to To Do, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity using the built-in features. If you already have an established system in To Do, 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 GTD system in To Do. This is not a technical manual, nor will it cover all the instructions for how to use To Do. We'll leave that to the folks at Microsoft 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 To Do. Even with your lists managed in To Do, you'll still have your calendar and email in other programs, unless you are using the web version inside of Outlook where those are in the same app.

Whatever configuration you choose in tools like To Do, 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.

Don't worry about using every available feature and add-on in To Do. 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.

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UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of To Do 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 captured by asking the key clarifying questions, about what something is, and what you want to do about it.

2. IMPLEMENTATION You have installed at least the basic gear to support a GTD system, including ubiquitous capture 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 To Do 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.

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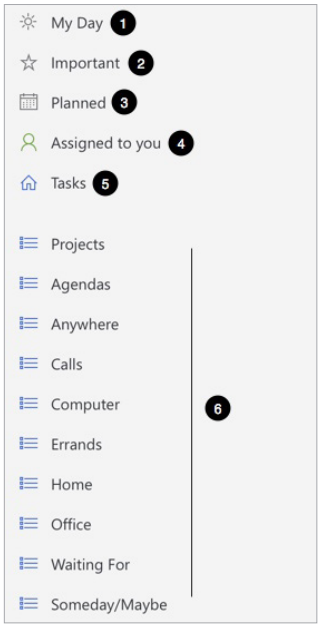
DEFAULT LISTS IN TO DO

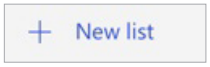
1. **My Day:** Items that you have tagged in the To Do app as something to work on today.
2. **Important:** Items you have starred as important.
3. **Planned:** Upcoming items with a due date.
4. **Assigned to you:** Items assigned to you through the Microsoft Planner app.
5. **Tasks:** A list that can be used as inbox for unprocessed entries (described later in the Guide).
6. **Lists:** These are the GTD lists you will create (Agendas, Anywhere, Calls, etc.).



SETTING UP LISTS

Let's set up the 10 suggested lists in the web, Windows, or Mac version of To Do 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 suggest doing this initial setup on your desktop version of To Do and not your mobile device.

1. Click on New List in the bottom left corner of To Do (or use shortcut Ctrl + L on Windows, or ⌘ + L on Mac).



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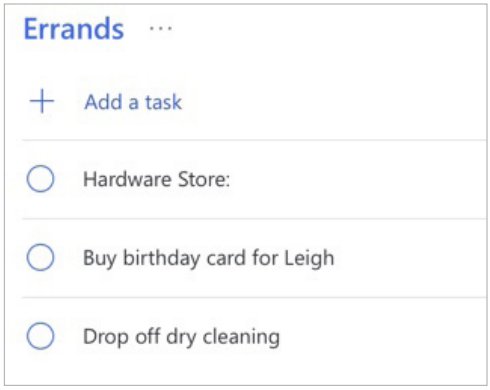
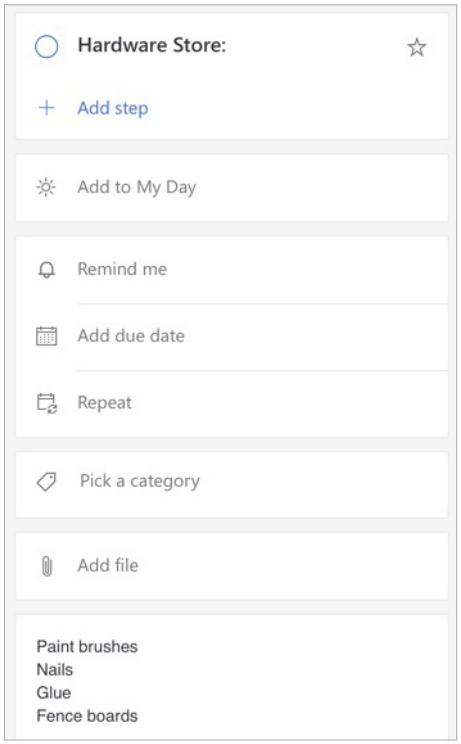
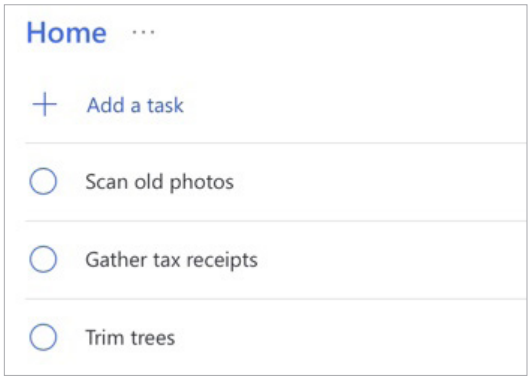
ERRANDS This holds reminders of things that you need to do when you are "out and about" (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one thing to do or get at one of those locations (like the hardware store), make "Hardware store" the Subject and put your running list of things to get/do there in the Notes field.





Go ahead and capture any new items for your Errands list that come to mind.

HOME This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard copy photos, etc.).



Go ahead and capture any new items for your Home list that come to mind.

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REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), as often as you can or when appropriate. On a weekly basis, in your GTD Weekly Review, we recommend reviewing all of your actionable lists in To Do, including Next Actions, Waiting For, Someday/Maybe, and Projects. This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each Project is moving forward.

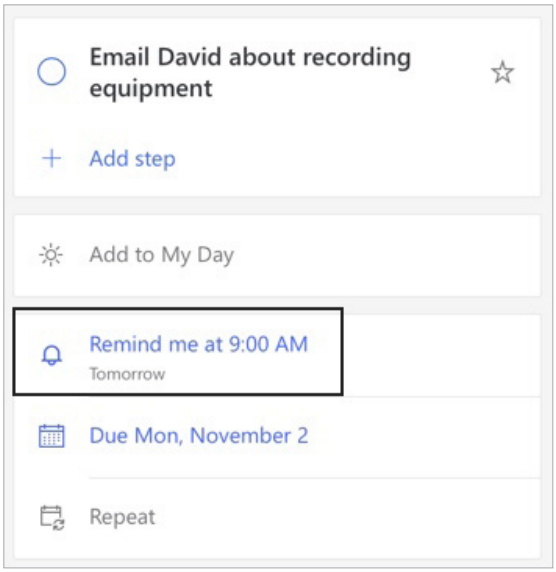
USING DATES, REMINDERS, STARRING, AND THE MY DAY LIST

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 constantly 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.

REMINDERS

In addition to due dates you can set up reminders for your tasks in To Do. In our experience, many people overuse reminders and start to go numb to them. Use them sparingly when you really need the extra support of being reminded that something is due and start to build your habit of regular reviews of your lists and calendar to trust you know what's coming due.



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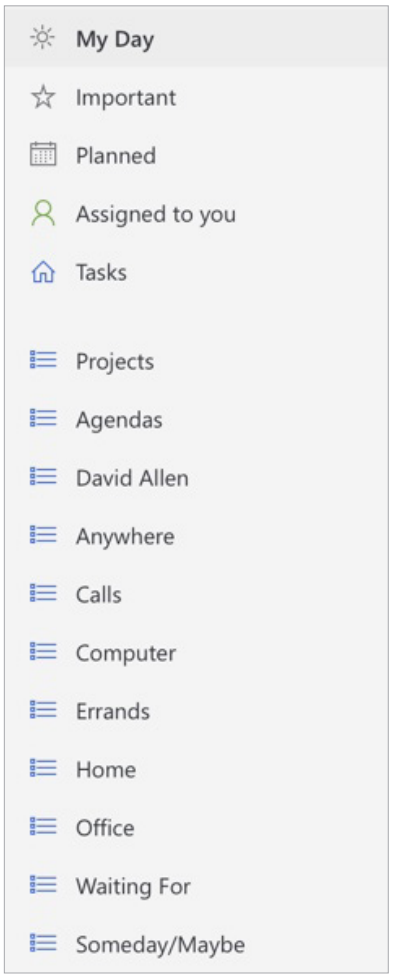
INTEGRATING TO DO AND OUTLOOK DESKTOP

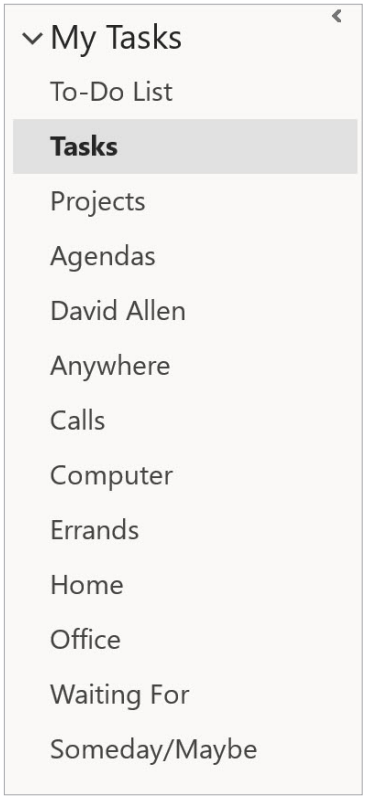
To Do can be used as a stand-alone app, as described throughout this Guide, and can also work in combination with Outlook desktop. Think of To Do as a viewer of Outlook Tasks. The data is one and the same. Tasks you create in Outlook should sync seamlessly to To Do, and vice versa. There are some differences to be aware of:

- In our GTD & Outlook for Windows Setup Guide, we instruct you to create Task folders. These folders become lists in To Do. Same functionality and data, just different names.
- To Do has features that Outlook does not, such as My Day, Important, and Planned views, as well as Subtasks/Steps, and Tagging. Outlook will not change any settings for these, if you set them in To Do, but won't recognize those attributes given they are not functional in Outlook desktop.
- In To Do, starred items are called Important and in Outlook they are called High Priority.
- To view Outlook Tasks on mobile, download the Microsoft To Do mobile app, for iOS and Android.

Lists in To Do



Folders in Outlook Desktop



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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 MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com

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