



# TODOIST<sup>®</sup>

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## Setup Guide

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## FOCUS OF THIS GUIDE

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

We strongly recommend the Pro or Business versions to get the most out of Todoist for GTD. Recent changes to the Free version have limited the functionality quite a bit (namely, you can only create five projects/lists in total). However, if you want to stay with the Free version, we have included some suggestions in this Guide to work around the limitations. The instructions in this Guide match the latest version of Todoist, with the latest features available, as of November 2021.

If you are new to Todoist, 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 Todoist, 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 Todoist. This is not a technical Guide, nor will it cover all the instructions for how to use Todoist. We'll leave that to the folks at Todoist 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 Todoist. Even with your lists managed in Todoist, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like Todoist, 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 Todoist. 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

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To get the most out of Todoist as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done<sup>®</sup> 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<sup>1</sup> 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 Todoist 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.

<sup>1</sup> *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback.

# APPLYING GTD TO TODOIST<sup>®</sup>

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## PROJECTS AND NEXT ACTIONS

### USING TODOIST TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Todoist is an excellent option for managing the Projects, Next Actions, and Waiting For lists in your system. We recommend you create lists in Todoist to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

### THE MOST COMMON GTD LISTS

Here are the 10 lists that are a good starter set for most people:

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

Sorting your next actions by context (lists 1–7 above) is recommended because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, 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.

### SETTING UP LISTS

Let's set up the 10 suggested lists in a PC, Mac, or web version of Todoist 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. Important: If you are a Free version user, we recommend reading this section thoroughly to understand the concept of the recommended GTD lists, but your setup will be different than described due to the Free version limitation of only being able to create five projects/lists in total. We have recommendations for a setup specifically for Free version users at the end of this section.

We recommend doing this initial setup on your desktop device and not your mobile device.

There are two ways to view your Todoist data: as Lists or Boards. We'll show the List view throughout this Guide, for consistency. Whichever view you choose is entirely personal preference. Both are functional for GTD.

## USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Todoist offers many shortcut keys for common functions in the app. Shortcuts will vary by platform, so [check out the shortcuts for your version of Todoist here](#). You can also see the shortcuts for your version by entering the ? symbol in the app. Here is a short list of the most common ones:

**Add a Label:** @

**Add a Project** (or assign to list if you are using the setup we suggest at the beginning of this Guide): #

**Quick Add inside the app:** q

**Quick Add using menu-bar icon:** Shift + Command + A on Mac or Ctrl + Alt + A on Windows

## USING SIRI

If you're an iPhone user, you can use Siri to add new and view existing items in Todoist. For more instructions and examples on using Siri with Todoist, view the [helpful support doc](#) on the Todoist website. Now, we'll go into greater detail about what goes on these 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. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your "Calls" list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

To create an agenda for a particular person, click on the Agendas list and click the Add Task button.



Or, use the keyboard shortcut q to create a new list entry (what Todoist calls a Task). [Click here](#) for a full list of Todoist keyboard shortcuts.

Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). For example:



## LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data “project support,” and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management.

Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you at the moment? You probably chose to avoid it and do something else, especially if you knew there was still thinking to do on next actions in the project materials.

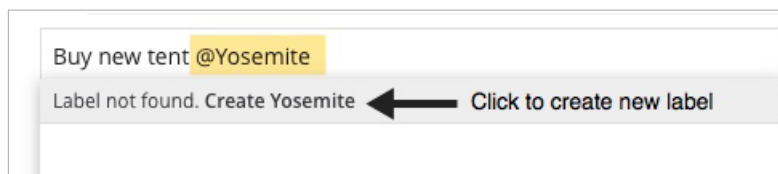
When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action. You can always add a keyword for the project in your next action or waiting for description. That way, you can rely on the powerful Todoist search function in the top middle of Todoist, use the shortcut keys ( / ) or ( f ) or (ctrl f in Windows 10) to pull together related information. For example, if you wanted to pull together everything related to the “Yosemite” project, searching on that keyword will show you the results of all entries that include that word.

| Results for “yosemite”   |               |
|--|---------------|
| Tasks  | Comments      |
| <input type="radio"/> Take hiking trip to Yosemite                         | Projects ●    |
| <input type="radio"/> Call Yosemite guide back about supplies needed       | Calls/Texts ● |
| <input type="radio"/> Email David about hiking boots for Yosemite          | Computer ●    |
| <input type="radio"/> Email Carl about trails he's done in Yosemite        | Computer ●    |
| <input type="radio"/> Jukka to let me know if he's coming on Yosemite trip | Waiting For ● |

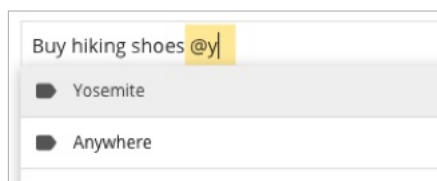
## USING LABELS

You can also use labels for a specific project and search on that label. For example, you could label the project, and all of the related next action and waiting for items. Then, when you search on that label, you can see everything related to the project in one quick view.

To add a label to an entry, type the label name in the subject line, starting with the “@” symbol. If the label does not currently exist, you will be prompted to add the new label.

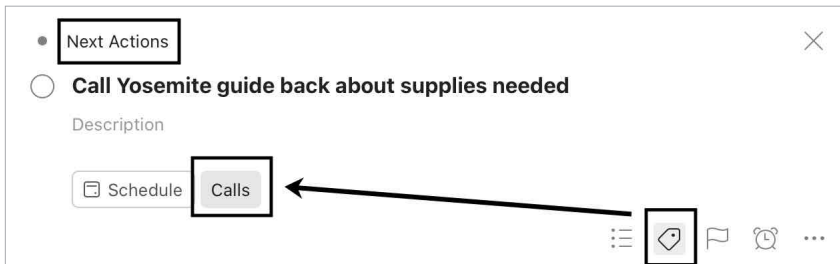


If the label does exist, typing the @ symbol and the first letter of the label will display your list of existing labels to choose from. Select the correct label and then save the entry.





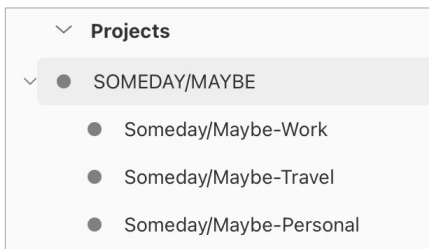
For example:



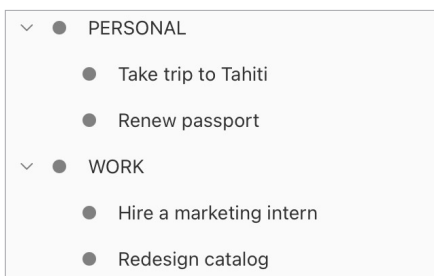
## CREATING FOLDERS

Another handy feature of Todoist is creating folders for your Projects view. This can be helpful to group lists of a similar nature or topic. To create a folder, create a parent project that won't serve any purpose other than serving as a folder and drag one list and drop it under another.

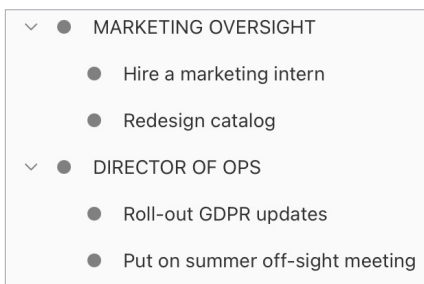
For example, if you create multiple Someday/Maybe lists, you could group them in a folder in your left navigation panel:



Some people like to separate projects by personal vs. professional:



Or, organize your projects by Area of Focus:



## EMAIL

### INTEGRATING ACTIONABLE EMAIL WITH TODOIST

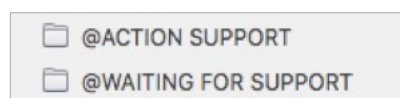
The master key to managing email is the most difficult habit for many to change—working from a regularly empty inbox.

It takes less mental 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. 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 “In” as the safest place.

### TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

#### OPTION ONE: Use Lists in Todoist or Your Calendar as the Action Reminder

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

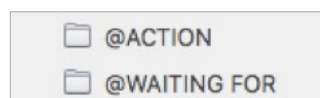


People often like this first option because all of your reminders will be tracked in as few places as possible.

***Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.***

#### OPTION TWO: Use The Email As The Reminder

Create @Action and @Waiting For folders in your email program and use them as an action list. You would not also put those reminders on your calendar, or Next Actions or Waiting For lists in Todoist—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



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've already processed if the next action is not apparent in the subject line.

## CALENDAR

### WHAT BELONGS ON YOUR CALENDAR

Outside of Todoist, your calendar is a critical component in your system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions lists in Todoist, which can be done BY a specific day, or on ANY day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about what’s next. There are only three things that belong on your calendar.

#### 1. TIME-SPECIFIC ACTIONS Things that need to happen on a specific day and time.

Examples:

- Meetings, appointments, time blocked to work on projects

#### 2. DAY-SPECIFIC ACTIONS Things that need to happen during the day, but not at a specific time.

Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

#### 3. DAY-SPECIFIC INFORMATION Information you want to know or be reminded of that day—not necessarily something to do.

Examples:

- Things that might disrupt your day (server shut-downs, office moves, etc.).
- External events to be aware of (marathons, elections, heads of state visits, etc.).
- Activities related to other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc.).

Here is a calendar showing all three types of entries:

|        |   |
|--------|---|
|        | FYI: David in Tokyo <b>3</b>                    |
|        | Morten's Birthday                               |
|        | Send updated spreadsheet to Jose <b>2</b>       |
|        | Submit expense report                           |
| GMT-07 |   |
|        | Update meeting with Luca <b>1</b><br>10am – 1pm |
| 11am   |   |
| 12pm   |   |

# CONCLUSION

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## 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<sup>®</sup>.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD practice up and running.

**For technical support with Todoist, please visit:**

[Todoist.com](https://todoist.com)

**For more information about GTD, please visit:**

[gettingthingsdone.com](https://gettingthingsdone.com)

[gtdconnect.com](https://gtdconnect.com)