gtd®

GOOGLE® APPS
FOR DESKTOP

Setup Guide

David Allen Company

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FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD® system using the native applications available from Google®, commonly referred to as Google Apps™ or G Suite™. We will refer to them primarily as Google Apps throughout this guide.

This Guide covers four components of a GTD system and the Google Apps we recommend:

Email Gmail™
Calendar Google Calendar™
Project & Next Actions Lists Google Tasks™, Google Keep™, or Google Drive™
Reference Google Tasks, Google Keep, or Google Drive

If you are new to Google desktop apps, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity. If you have already established your system using Google Apps, use this Guide to fine-tune or simplify your system and discover where you have under used features or overcomplicated your setup.

Don't worry about using every feature in your Google Apps. There is likely far more built in than you will ever need. Focus on what makes a difference for you. It's important to not overcomplicate your systems to the point where you can only maintain them 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.

This Guide does not focus on all of the technical aspects of Google, particularly syncing. There are simply too many variables for us to fairly and adequately address every user's needs. Google, your handheld device technical support, or your IT department will be your best resources for that.

The primary focus of this guide is about applying GTD to the applications available from Google Apps now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

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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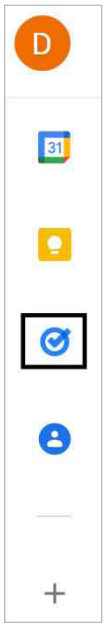
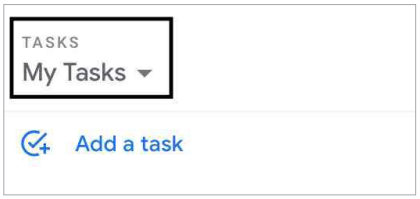
CREATING PROJECTS AND NEXT ACTIONS LISTS IN GOOGLE TASKS

Let's go ahead and set up the 10 suggested lists in Google Tasks now. You can always go back to customize these later, as you discover what will work best for you.

1. Open the Tasks application available through the Tasks icon in the right margin of Gmail or Google Calendar.

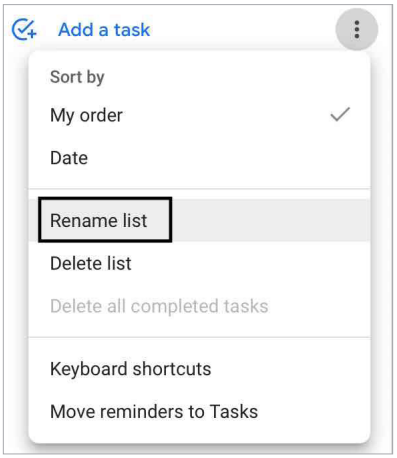


The Tasks window will expand in the right margin. If you are new to Tasks, the default list called My Tasks will appear, which we will rename to one of the 10 recommend GTD lists.



If you have used Tasks before and have created custom lists (as we will do in the next step), it will open to the last viewed List. If this is the case for you, change your list view to My Tasks using the down arrow next to the list name.

2. Click on the 3 dots ⋮ to the right of Add a task to rename the list My Tasks.



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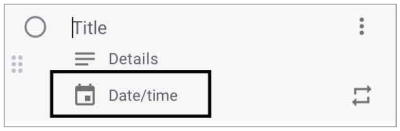
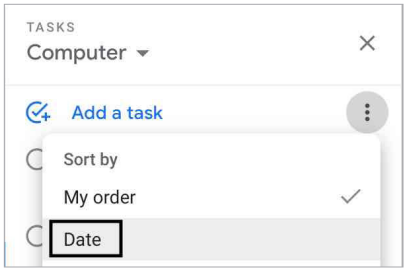
USING DUE DATES

Due dates are effective for your "hard landscape" items that will expire if not done by a specific date, or when you know that adding a due date will motivate you to complete that item. However, be careful you don't get into the trap most people get into with due dates, which is to use them for nearly everything that needs to get done. It's too easy to go numb to ALL of them when you start seeing the majority of your items grabbing your attention with a due date.

Due dates are added within each Task.



You can sort your lists by due date by clicking the 3 dots to the right of the list name and changing the sort to Date.



Now let's talk about what goes on your new lists…

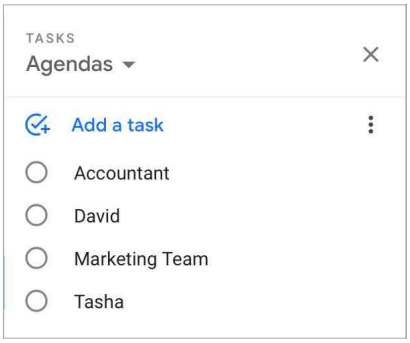
EXPLANATION OF THE COMMON GTD LISTS

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.

You could easily have a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

You can create agendas two ways:

Option One: Add the person or team name in the subject line and use the details field to capture your agenda items. With this method, you only have one agenda entry per person or team.



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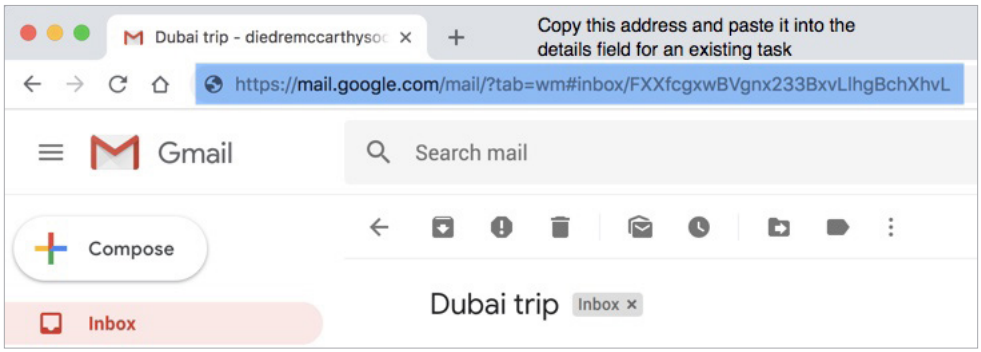
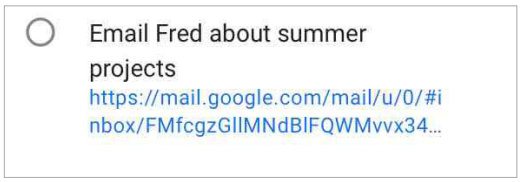
LINKING BACK TO EMAILS

Did you know that each email in Gmail has a unique URL that will bring you directly to that email when you are signed into your Google account? That can be handy if you've pasted that email's unique URL in the details field of a project or task. To use this feature, open an email in Gmail. The URL you see in your browser window is the unique URL for that email. Copy and paste that email into the notes field of an existing project or task. (You can also test this out by opening a new browser window and pasting the URL to see that it goes to the email you intended.)





Of course, you won't need to copy the URL to create new Tasks. You can simply drag and drop the email from Gmail into a Task list or use the keyboard shortcut Shift + T. We cover more about this in the email section later in this Guide. Press Shift + ? to see a complete list of available shortcuts in Gmail and Google Tasks. (Be sure keyboard shortcuts are enabled in Settings, for this to work.)

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 Action 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 in the moment? Probably more repelling than attractive for you, especially if you knew there was still thinking to do from the project support.

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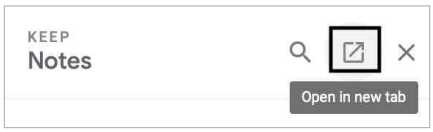
USING GOOGLE KEEP TO MANAGE LISTS

Another option for managing your lists is in Google Keep. An icon for Keep can also be found in the right margin of Gmail to launch a limited version in the sidebar. Unlike Tasks, which is only accessible through Gmail, Keep also offers a more feature-rich, full-size version through https://keep.google.com or by clicking on Open in new tab icon in the top right corner of the Keep viewer in Gmail.

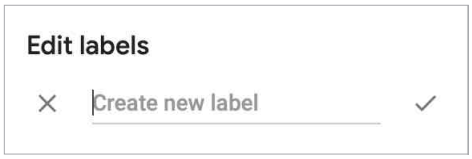


With our method, Projects and Next Actions Lists will be set up as Labels, and entries on those lists will be added as individual Keep Notes.

CREATING LISTS IN KEEP

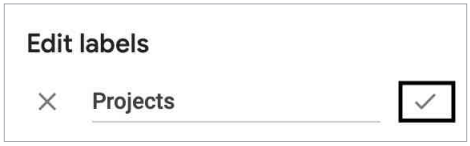
To get started, open the full size version of Keep by clicking on the Open in a new tab icon. You will not be able to make these changes within the limited Keep viewer in Gmail.

First, create Labels to represent your list names. Click Edit labels in the left margin of Keep.



NOTE: If you don't see the Labels option, click in the top left corner to expand the left margin.

Type your label name and then press enter or click the checkmark to save your new label.



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CALENDAR

CALENDAR MANAGEMENT

Your calendar is a critical component in your GTD system for reflecting the action choices that need to be done ON a specific day versus those that you see on your context lists in Google Tasks or Keep, which can be done BY a specific day, or on ANY day. Your Day 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?"

Open the Calendar Application available through the shortcut window in your browser:

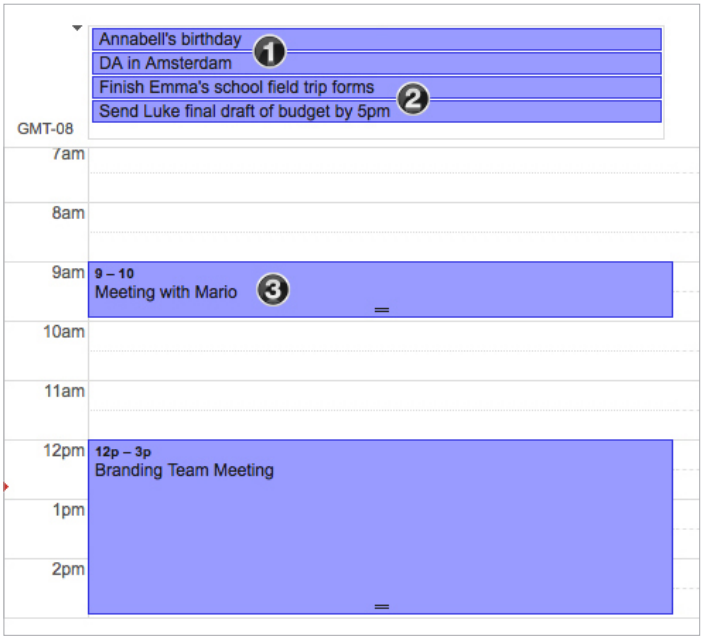
If you don't see the Calendar icon, click More. This shortcut window is where you can also create and move around shortcuts for the Google Apps you use most often.

THE THREE THINGS THAT BELONG ON YOUR CALENDAR

1. 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 of other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc.)



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

Examples:

- Meetings, appointments, time blocked to work on projects

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EMAIL

MANAGING EMAIL

The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox. It takes less psychic 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 (at least once a week in the GTD Weekly Review). 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.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have made a decision about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in the Guide) you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file[3])?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

Do it now If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For in Google Tasks or Keep.

Defer it If you need to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list in Google Tasks or Keep.

If multiple actions, what's your desired outcome? Track that outcome on your Projects list.

[3] For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

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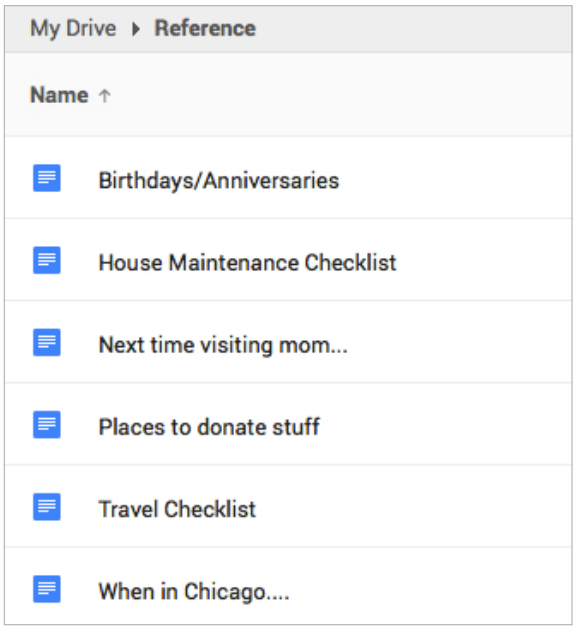
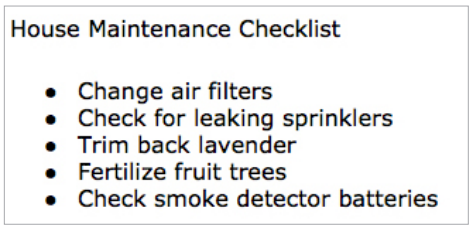
There are a variety of Google applications for managing your Reference. From a GTD perspective, it needs to be a place that is easily accessible, sort-able, and retrievable in a logical, intuitive way.

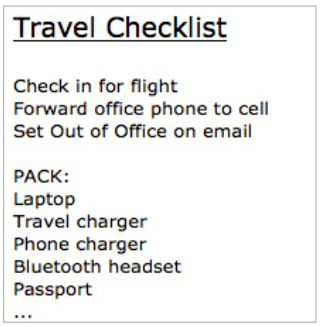
Some people prefer to put all of their lists in Google Tasks, and not split them out between Tasks for projects and actions and another application for reference. By all means do that, if you think that would work better for your workflow. Simply set up these suggested reference lists in Google Tasks, like you did for Projects and Next Actions earlier in this section. Just be sure your reference lists are clearly delineated from your action lists.

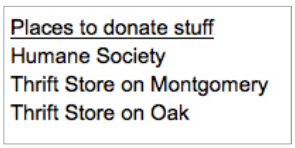
People have also found it valuable to keep their Reference lists in Google Drive (https://drive.google.com) in a Reference Folder.

Example of reference lists set up in Google Drive:









You may also want to consider Google Keep (https://keep.google.com) for your reference.

An easy way to setup Google Keep for reference is to create your primary categories as Labels (e.g., Reference, Checklists, Travel, etc.) and the Notes could store lists.

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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.

PLEASE CONTACT GOOGLE FOR TECHNICAL SUPPORT WITH GOOGLE APPLICATIONS:

https://support.google.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com

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