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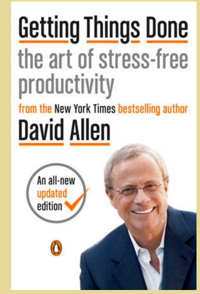

File: Getting Organized

Getting Things Done:

The Art of Stress-Free Productivity

By David Allen (Penguin Books, 2nd Edition 2015)

S.O.S. (A Summary of the Summary)

The main ideas of the book:

~ This book provides an organizational system that helps people with too much to do and too little time.
~ The goal is not simply to help people get more done, but to do so in a way that decreases stress.

Why I chose this book:
How could I resist a book that aims to help people remove stress and anxiety from their work lives and yet make them more productive at the same time? That's certainly what I want for myself.

I had read this New York Times bestseller years ago, and realized I was already partially putting it into place. But after reading it thoroughly for you, I put the entire system into place and I am thrilled with how organized I feel! One of David Allen's clients had this to say, "When I habitually applied the tenets of this program it *saved* my life… when I faithfully applied them, it *changed* my life." Hopefully you can get the same benefits!

While this book is not specifically for school leaders, I can't imagine a better fit – educational leaders are overwhelmed with the need to get control over a varied and vast array of tasks while desperately wanting to be more focused and present for the students, staff, and families they serve.

David Allen has been a management consultant, executive coach, and trainer for the past three decades and he has perfected a simple and practical way to organize your stuff, your tasks, and your time.

A Few Other Resources:
• There are resources on David Allen's website (mostly for sale): http://gettingthingsdone.com/
• If your teachers need help with their own organizational skills, see The Main Idea's summary of *The Together Teacher* (and Maia Heyck Merlin also has a more recent book, *The Together Leader*)
• If you need help with your habits, you also might want to read The Main Idea's summary of *The Power of Habit*

The Scoop (In this summary you will learn…)

The five steps to stay on top of all of your work and personal commitments in a productive and stress-free way:
✓ How to (1) ***capture*** all of your tasks
✓ How to (2) ***clarify*** what each item means and what to do about it
✓ How to (3) ***organize*** the results
✓ How to (4) ***reflect*** on which items to do when
✓ How to (5) ***engage*** in doing the actual tasks

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Introduction

How would you like to be more relaxed and have less stress while *getting a lot more accomplished*? This book is a practical guide to managing your time so you can be more efficient and have less stress at the same time. If you're reading this, you probably like getting things done and getting them done well. This book shows how to maximize your efficiency so you can bring more clarity, presence, and yes, enjoyment to your interactions. Allen has developed an approach for dealing with the 24-7 onslaught of information and tasks that come our way. He has spent three decades learning about organizational productivity and coaching thousands of busy leaders and individuals to figure out how to: (1) capture, (2) organize, and (3) organize all of their commitments. He does this not just so people can check off all of those work to-do items, but also so they can pay more attention to their kids' school plays and sports games. Busy leaders are deeply in need of these types of organizational skills and developing healthier lifelong habits as well.

Part I – The Art of Getting Things Done

Chapter 1 - AN OVERVIEW OF A NEW PRACTICE FOR A NEW REALITY

When was the last time you felt highly productive and had a profound sense of control and calm at the same time? It is *actually possible* for an individual to get an overwhelming number of tasks done while also operating in a stress-free way with a clear head. And yet most people feel they have too much to do and not enough time to get everything done. Most of us encounter a huge amount of information and communication from others, and yet we haven't been taught *how to deal* with this extraordinary volume of commitments. What if we could accomplish everything that needs to get done while being able to devote 100 percent of our attention to whatever it is we are doing in the moment with no distractions?

The approach presented in this book--the Getting Things Done (GTD) system--shows how to do this, and only requires small changes in the way you organize your tasks and time. And yet those who have implemented these small changes report that the results are transformational. The tools, tips, and techniques presented here help with three fundamental goals:

(1) To identify and capture everything you need to get done—tasks for now, later, someday, big, little, or otherwise—in an organized system *outside* of your head
(2) To clarify what these tasks mean so you always have a clear idea of "next actions" to implement
(3) To help you make decisions about how to move forward with all of these tasks so you always know that what you are doing is exactly what you should be doing now

Most of our stress comes from mismanaging our commitments. We end up giving either more or less attention to tasks than they deserve because we are not operating with a clear mind. The approach to time management introduced here ensures that every task is captured and organized so we can clear our minds to know how to respond appropriately to each commitment that comes our way.

It used to be clearer what we had to do. When fields needed to be plowed and cows needed to be milked, we could *see* these tasks. Now, as organizational guru Peter Drucker describes it, "In knowledge work…the task is not given; it has to be determined." We spend a lot of time mulling over the tasks that need to be done, but most of that thinking simply muddies the mind and doesn't help to move us forward. Instead, we need to spend more productive time thinking about our tasks and organizing them so we: (1) clarify what the expected outcome should be, (2) decide what the very next step should be, and (3) put reminders of the actions into a system that works. Having a system like this helps to clear the mind. Think about a task you need to do. How many times have you thought about it already today? It's a waste of time to think about your to-do items in a way that makes no progress. Your brain will constantly remind you of things you need to do when you can't do anything about them. All this does is to increase your anxiety. We simply can't keep everything we need to do in our short-term memory. It operates like RAM, and there just isn't enough space. Rather than overloading our RAM and exacerbating our stress, we need to get all of that stuff out of our minds and into an organized system.

Chapter 2 - THE FIVE STEPS OF MASTERING WORKFLOW

To get control over all of the items you have to do--everything from cleaning out your kitchen to improving your organization--this chapter presents a system with five parts. Below is an overview of what is involved. We must:

(1) ***capture*** all of the tasks that come in
(2) ***clarify*** what each item means and what to do about it
(3) ***organize*** the results
(4) ***reflect*** on which items to do when
(5) ***engage*** in doing the actual tasks

Most people already do *some* of these items, but the problem is that we need to do all five of these steps and do them thoroughly. Most people *capture* their commitments in some way, but still keep too many items in their heads. And many people still don't *clarify* exactly what they need to do and leave vague items on their to-do list like "Mom" if they need to buy their mother a present. Others collect and *clarify*, but still don't *reflect* on what is their highest priority and end up *engaging* with the tasks that are the latest or the loudest. The problem with this half-hearted approach is that the system is only as good as its weakest link. That e-mail or commitment you missed may lead to significant consequences. This chapter introduces the five steps and upcoming chapters provide the step-by-step details to implement each one.

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The 5 Steps in the Getting Things Done (GTD) System				
I. Capture	**II. Clarify**	**III. Organize**	**IV. Reflect**	**V. Engage**

I. Capture: Anything that you have any intent on doing—personal, professional, big, little, urgent—must be captured. You can use either low- or high-tech tools, but the key is to capture absolutely *one hundred percent* of what it is you need to do. You may choose to use a physical in-tray, notebooks or other paper-based items, digital or audio devices, or e-mail and text messaging devices. There are three factors that will make your capturing devices successful:

1. They must allow you to take *all* to-do items **out of your head**. This means these tools should be kept close by.
2. You must have as **few capturing devices** as possible. For example, if you use paper, these should all be collected in a physical tray rather than remaining scattered everywhere.
3. The capture tools must be **emptied regularly**. For example, if you leave everything in your e-mail inbox, it gets unwieldy.

II. Clarify: This is the step that helps you regularly *empty* the to-do items you've collected above. In this step, you process everything you've captured by going through each e-mail, text, page of meeting notes, self-generated idea from the shower, etc. and asking a few questions in the **WORKFLOW DIAGRAM** below. The goal is to ask the questions that will help you sort each item into one of the eight final buckets highlighted in red. First you need to ask what the task is. Then ask, is it actionable? For example, it might be trash. Or it might be an article you want to keep for reference, but you don't want to do anything with it now. These items would all go on the 'NO' side because they are *not* actionable. For the items that *are* actionable, you need to decide if they are projects (anything that takes more than one step should be considered a 'project') or if they only involve one action (calling someone, brainstorming ideas for a meeting, researching the Internet for something). If the item takes under two minutes, do it. If not, either delegate it or defer it to what will be called your *Next Actions* list or *Calendar*.

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III. Organize: In this step you put things into one of eight categories of **reminders** (*in red above*) that result from asking the questions above. These **reminders** may be in the form of a list, a file folder, or a calendar entry. These eight include:

Projects List – This is a list of all projects, requiring more than one action step, that can be accomplished in a year. This is simply an index of the *names* of the projects, in no particular order, such as: get new staff member on board, update will, upgrade computers, etc.
Project Materials – Above is the list of the names of the projects, but here are the actual file folders or computer files that will hold all of the materials for each project. These should be stored out of sight.
Waiting For – When you decide to delegate tasks, this list will remind you of what you are waiting for and from whom.
Calendar – The calendar should *only* be used to remind you of those items that are time-specific or day-specific (can happen any time but *must* be on a certain day). Your to-do items should *not* appear here (see *Next Actions* below) otherwise they cloud what absolutely must get done on each day.
Next Actions – These include all of the one-step actions we need to take ourselves, such as call Jim Smith, draft ideas for the conference, etc. Most of us have around 50 to 150 of these items. Later you will learn how to organize this list.
Trash – These are the things you want to quickly throw away, shred, or recycle.
Someday/Maybe – This is a list of useful and inspiring items you might do someday. Let's say you read an article that gives you an idea, but you can't do it now. That idea goes on this list. It could be anything from *Learn Spanish* to *Set up a foundation.*
Reference – You probably receive a lot of useful information that you would like to reference someday. Whether you receive a menu for a local café or an article to keep on file, you need to set up a way to store and file these items – both paper and electronic – that can be easily accessed when required.

IV. Reflect: It's one thing to capture and write down everything you need to do, it's another thing to know what to do and actually do it. Step 4, reflect, is when you step back and review everything you've captured. If you don't regularly review all of your items to do, then you may slide back into keeping these items in your head. Instead, consider doing a ***Weekly Review*** to scan your *Projects, Waiting, Next Actions*, and *Someday/Maybe* lists. This doesn't mean this is the only time you review these lists. You will often scan your *Calendar* and *Next Actions* as needed when you have time to get things done, but the ***Weekly Review*** is a regularly scheduled time to reflect on what you have to do.

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V. Engage: So, once you have *captured, clarified, organized,* and *reflected* on what you have to do, how do you decide whether to call Mario or have that conversation with your secretary? The book presents three models you can use to help you decide what to do next. The first model--*The Four-Criteria Model for Choosing Actions in the Moment*—helps you choose what to do at any given moment given some basic criteria: (1) context – Make calls if you have a phone, do computer work if you are at your desk, etc. (2) time available – if you only have five minutes, compete a short task, (3) energy available – if you don't have much energy, choose a task that requires less mental or physical energy, and (4) priority – choose the highest priority task for that time. The other models, which will be explained later, help you consider your larger and longer-term goals as you think about whether to attend to the urgent work that shows up or tasks that you had already planned to accomplish.

Chapter 3 - MULTI-STEP PROJECT PLANNING: FIVE PHASES

Of all of the items you have to complete, the multi-step items are the ones that most professionals need the most help getting under control. This chapter introduces a model for a five-phase approach to help you plan projects. Most projects simply need you to identify the outcome and list a few basic steps. You want a new printer? You just need to look online, compare prices and models, and order one. But for about 15 percent of all projects, you will need a more *thorough* approach. For these projects, you can use the **Five-Phase Natural Planning Model**. The name comes from the fact that this is probably how you accomplish most multi-step tasks naturally--such as planning a dinner at a restaurant with friends--without knowing it. The steps include:

1. *Defining purpose and principles*: This is the *why* of your project. If you know why you're doing it, not only does that motivate you, but it helps with a lot of the follow-up planning questions. Knowing why helps you decide whether to spend the money for that five-color brochure or go with the cheaper two-color one.

2. *Outcome visioning*: This is the *what* question – what exactly will the outcome be? In both the personal and professional arenas, being able to envision clear outcomes is one of the most important skills and yet it is not as self-evident as it may seem.

3. *Brainstorming*: Once you can envision the *what,* now you need to think about *how* you will get there. Brainstorm as many ideas as you can that come to mind, without regard for the quality of those ideas. You are going for quantity here. One common way to brainstorm is with a *mind map*: put the project idea in the center (like 'Move office') and then use branches for any ideas that come to mind. Brainstorming not only helps you capture your existing ideas, but it helps you generate new ones as well.

4. *Organizing*: The next step in planning *how* to get the project done is to organize those ideas. You may choose what to do next by sorting your ideas by *components* (the categories your ideas fall into), *priorities* (those you should work on first), or *sequences* (the order they should be done).

5. *Identifying next actions*: The final stage is to identify each next action. 90 percent of what you think of as "project planning" is really listing all of your projects and managing the next steps to do for each one. It is here that you decide what you can do next without some other component needing to be done first. And if there's still more planning to do before asking what's next, then you may need to go back to one of the above steps for certain components of the project.

Part II – *How* to Get Things Done: The 5 Steps to Stress-Free Productivity

The first part of the book provided the overall conceptual framework for how the Getting Things Done (GTD) system works. This part provides more details and step-by-step procedures to guide you in actually implementing it.

Chapter 4 - SETTING UP THE TIME, SPACE, AND TOOLS

Time: To put this entire system in place, Allen recommends that you set aside two whole days. A weekend or a holiday is an ideal time to do this. The first step alone—finding all of your incomplete tasks and capturing them in one place—can take six hours. Also, it takes a great deal of *mental energy* to organize all of the open tasks that have been accumulating over time, often because you are undecided or unclear how to proceed. However, two days are not required, and you can benefit from this system even with less time.

Space: You will need to decide on a physical location for your "cockpit of control." If you work from both home and work, you need to set up identical systems in the two places. To ensure that your workspace is functional, you'll need a writing surface, an in-tray, space for digital tools such as phone and computer (for most people), stacking trays, file drawers, and reference shelves.

Tools: Below are the items you will need for all of the collecting, processing, and organizing involved in this system.

- At least 3 stacking trays
- A stack of plain letter-size paper
- Post-its
- Paper clips
- Stapler and staples
- Scotch tape
- Rubber bands
- An automatic labeler
- File folders
- A calendar
- Wastebasket/recycling bins
- Tools to capture and organize your tasks (mobile devices, computer, paper-based planners and notebooks)

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For example, the tray will help to ***capture*** tasks and as you ***clarify*** and ***organize*** them, you will come across a number of under-two-minute actions that will require the use of a stapler, paper clips, and Post-its. One of the trays will serve as an in-box and, after completing those quick items, you'll need a tray for tasks that require more than two minutes (articles, reports, and other documents).

There are a few things to keep in mind as you decide **what kind** of organizer tool(s) you want to use (the last item in the box). You might use a low-tech option like paper in folders and/or a notebook or planner, or you can use a digital planner, or you can use a combination of the two. Consider these three questions to help you make your decision:

(1) How do you want to *see* your reminders of actions, agendas, and projects?
(2) *Where* and *how often* do you need to review them?
(3) Are you *already committed* to using something for managing lists and at-hand reference information?

Whatever you choose should help you change your behavior. Perhaps you receive a lot of information digitally, so it's easier to capture it using digital devices. Maybe you want to consider aesthetic or enjoyment criteria as you choose your tools. Either way, the tool itself will not guarantee you stress-free productivity; it depends on how well you use them in implementing the GTD approach. As Allen writes, "A great hammer doesn't make a great carpenter, but a great carpenter will always want to have a great hammer." (p.96) At the heart of it all, what you're doing is *managing lists*. You just need to be able to do this while you are on the run and in a way that you can easily and regularly review those lists.

Also, a few notes about your filing system. The lack of a good filing system is one of the biggest obstacles to a smooth personal management system. It's the reason people have piles of random unactionable items on their desk or on their computer. They simply need a good general-reference system to hold all of the articles, brochures, pieces of paper, notes, printouts, tickets, keys, flash drives, and more that might be useful to keep for later reference. The goal is for you to take no more than *one minute* to take one of these items from your in-tray or your e-mail, and be able to file it away in your trusted filing system. Often the first thing Allen does with a client is to drive to an office supplies store and purchase a filing cabinet and a large stack of file folders. Keep in mind that this is for a *general*-reference filing system, not for student or human resource files. Also, you will need a general-reference filing system both for actual papers and for your computer so you can digitally file items that come your way digitally into electronic folders (rather than storing them all in your e-mail inbox as many people try to do!) Allen also recommends that you organize both your physical and electronic files into *simple* A-Z systems. Many people group items and file them like that, but this may mean that you forget where you file an item. Also, it needs to be easy to create new files, so keep a stack of file folders nearby and make sure you have enough space to continually create new files. To help with storage, purge your files once a year.

Chapter 5 - *CAPTURING*: CORALLING YOUR "STUFF"

The 5 Steps in the Getting Things Done (GTD) System				
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As was described in the overview in Chapter 2, this first step involves gathering all of your incompletes or all of your "stuff" into one place – the "in-tray." The capture phase when you are *first* implementing this process can take between one and six hours. While you may be tempted to do a partial job here, it's worth it to shoot for 100 percent – gathering absolutely everything you have to do. This not only gives you a sense of the overall volume of what there is to do, but also, once you start the next steps of ***clarifying*** and ***organizing***, you don't want to be distracted with thoughts of all of those other items that you have yet to ***capture***.

Physical Gathering: To start organizing all of those physical items—business cards, that old charger in the bottom of your desk drawer, to-do lists on Post-it notes, etc.—you are going to need an in-tray and a stack of paper for you to take notes. Clearly everything won't fit into one in-tray, so be prepared to create piles on the floor. If something is too big, you can put it somewhere else and in your in-tray leave a note, "Artwork behind door." Finally, make sure you don't start ***organizing*** (step two) while you are in the middle of ***capturing***. It is better to focus on this one step first, unless you have items to discard, then do that now. Where will you find all of these physical items? On top of your desk, in desk drawers, inside cabinets, on shelves, etc. You will also want to empty each voice message onto a piece of paper, but you can leave e-mail messages where they are because of the volume.

Mental Gathering: After you've corralled all the physical items that need to be processed, it's time to empty out your mental RAM space. This is where your stack of paper comes in handy. Put each task or project that resides in your mind on a *separate piece of paper*. The idea is to give each thought its own placeholder to be dealt with later. Clearing your head will initially take between twenty minutes and an hour. To help you think about what these items might be, the book has a list of over 200 items that might be in your head. Take a look at some of the topics here, dump each one that's in your head onto a piece of paper, and toss those into your in-tray:

Professional:	"Look into" projects Reports to submit Upcoming meetings	"Outside" organizations to contact Articles to write Planning upcoming events		Phone calls to make Articles/books to read Staff development	Staff to hire Getting feedback from staff
Personal:	Skills to develop Taxes	Books to read Pets	Clothes Home repairs	Friends Vacations	Returnable items Doctor appointments	Upcoming events Children

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Chapter 6 - *CLARIFYING*: GETTING "IN" TO EMPTY

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Now that you've captured everything you need to do in some form of "in tray," the next step is to get to the bottom of "in." This does *not* mean you will be sitting down and actually *doing* everything. Rather, *clarifying* means you will be going through each item and deciding what it is and what you're going to do about it. See the **WORKSFLOW DIAGRAM** below: *What is it? Is it actionable?* For example, if you pick up the next item in your "in box" and realize you need to call Andrea about this, but she's not in until Monday, then you will put this on your *calendar* (one of the eight places to-do items might land; see the chart below). However, before you start this step for the first time, you may want to read through the chapters on *clarifying* and *organizing* first.

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Processing Guidelines – There are three important rules to follow while you are clarifying or processing your in-box:

(1) **Process the top item first**: When you look in your in-tray, even if the second item is a congratulatory note from your boss, and the first is a laborious task, you must start with the first item. Many of us open our e-mail or look through our in-tray and choose to do items that are fun, easy to process, or interesting first. This involves decision making and therefore takes more time and energy. Instead, you should develop the habit of going through each item starting with the top one and only asking, "What is it? What action is required?" At times, you may need to do an "emergency scanning" to, for example, scan for any new information before a conference call in fifteen minutes. However, in general, if you break the rule and process only what you want to, then you will start to leave items *unprocessed*. You need to crank through each and every item, one at a time. So, where in the pile or e-mail inbox should you start? Start with the *newest* item in your e-mail to save time responding to e-mails before reading an entire discussion thread.

(2) **Process one item at a time**: Some people dump the entire stack from their in-tray onto their desk. If you do this, you will be tempted to work on the items you *want* to. It takes restraint, but it is better to physically remove only the top item from your in-box.

(3) **Never put anything back into "in:"** As soon as you pick something up from "in," you must decide what to do with it. Do *not* put it back into "in." It is an inefficient waste of time and actually drains your psychological fuel tank.

The Key Processing Question: What's the Next Action?
It is not always so clear what to do when you look at the first item in your in-box. Should you call someone? Fill out a form? Get more information from the Internet? Buy something? Talk to your assistant? This is the key element in step 2, *clarifying*. Below is a description of the first decision you need to make, is it actionable or not? (You can see this in the **WORKFLOW DIAGRAM** above.)

No, it is NOT actionable
If you look at the right side of the **WORKFLOW DIAGRAM** above, there are three cases when an item is *not* actionable: when it is *trash*, when it is to be done *someday/maybe,* and finally, when it should be filed as *reference.*

Trash – You've probably already collected many things in "in" that you realize you don't need or which are no longer useful, so you have probably already thrown out piles of stuff. For the rest, some people follow the philosophy, "When in doubt, throw it out," and others believe "When in doubt, keep it." Choose the philosophy that fits you. If you've set up a simple enough reference system with plenty of space to save information in A-Z files, then it's fine to follow the latter approach. Furthermore, the digital world allows us to save a lot more than we ever have before. However, keep in mind that a reference library that is too big may no longer be useful. Be sure to go through reference materials periodically to purge them. Overall, now that you are processing your "stuff" more systematically, you should be more aware of what you plan to do and what you will not do, so throwing things out should be easier.

Someday/Maybe – There will be items in your in-tray that require you to do nothing now, but they may require action in the future. For example, you may need to write an agenda for a meeting someone set up in three weeks, or you might learn about a guest speaker at a breakfast coming up in a month that you're not sure you want to attend, or you may want to take a watercolor class sometime in the future. You can choose one of two places to write a reminder about items like these: on your *Someday/Maybe* list or in your *Calendar* (or tickler file, to be described later). Then keep any associated paperwork in a "Pending" stack tray for now.

Reference – Ideally you will have already set up a functional filing system for reference materials as described in Chapter 4. Remember that this should be an easy, 60-second filing system not an overly complicated and formal one. When you get to an item you want to keep for later reference, you should be able to pop it into a file, make a label for it, and put it in the proper place (or put a Post-It on it for an assistant to do this) within a minute. This is true for a digital reference system as well. Many people leave non-actionable items in their e-mail inbox because they haven't yet set up an easy system. Most e-mail applications allow you to create storage folders, usually in the navigator column on the side, if you want to keep actual e-mail messages as references. If you want to keep the attachments, the text, or the graphics from your e-mails, you can easily keep digital storage files in the cloud or in other programs that allow sharing across devices. To make this step run smoothly, you will need to take time to organize your electronic and physical reference system. Now is a good time if you haven't organized or cleaned out your physical and electronic filing systems.

Yes, it IS actionable

So far, the items that are trash are in the trash, the someday/maybe items are either on your *Someday/Maybe* list or in your *Calendar*, and the information you want to keep has been filed away in your *Reference* system. Now, everything else needs to be acted upon. However, sometimes we write down items to be done in a way that does not clearly describe the next physical action that needs to be taken. Look at the sample items that people often have on their to-do lists:

• Clean the garage	• Do my taxes	• Conference I'm going to	• Bobby's birthday
• Press release	• Performance reviews	• Management changes	etc.

Before we know where it goes, we need to ask what is the next action that needs to be done? For example, if 'Clean the garage' is on your list, you may be thinking, *"…Well, I just have to get in there and start. No, wait, there's a big refrigerator in there I need to get rid of first. I should find out if John Patrick wants it…"* So really, this will take more than one step and should be on your *Projects List*, but we can figure out the next action here: 'Call John re: refrigerator in garage.' Or, if you look at the item 'Do my taxes,' you may think, "*…but I actually can't start because I'm waiting for my last investment income documents…"* So the action here is, 'Waiting for documents from Acme Trust.' Sometimes you don't have a next action step because you still need to decide what to do about it. So this might be turned into, 'Research ideas about X on the Internet' or 'Call Susan to get input on Y.' Once you decide what the next action step is, you have three choices (again, see the **WORKFLOW DIAGRAM**): *Do it, Delegate it,* or *Defer it:*

Do it: When you first pick up an item, if it can be done in two minutes, do it. Browse through that catalog and toss it or file it away. Make that call and leave a quick message on someone's voicemail. Respond briefly to the question in that e-mail. The reason for the two-minute rule is that it would be inefficient to store and track all of these quick items; it's faster to just get them out of the way the first time around. But the two minutes is just a suggestion. When you have longer windows of free time, you might decide to follow a five-minute per item rule instead.

***Delegate it*:** When the item will take more than two minutes to complete, you need to ask if you are the correct person to do it. If not, then you need to delegate it. After deciding who needs to be involved, "My boss needs to put her eyes on this" or "I need my partner's point of view" you will need to reach out to that person. It is fastest to send an e-mail, but you can also make a call, add it as an agenda item for the next time you have a conversation with that person, or send a text. Once the item is passed off, you need to *track it* if you care what happens next. This will be described in the next chapter, but you will need to maintain some type of *Waiting For* list – whether in a file folder with papers, a list in a planner, or as a list in your software. It's also vital to include the date you handed off each item. (It's useful to be able to refer to this later, "But I called and ordered that on March 12.")

Defer it: Most of your items will take more than two minutes and will need to be completed by you: calls you need to make, carefully crafted e-mails, conversations with your life partner about the school your daughter will go to, etc. You will take all of these items and put them on a *Next Actions* list that is divided by category (Calls to make, Computer tasks, etc.) that will be described in Chapter 7. The other thing you will begin to notice is that much of what you have to do will take more than one step – or what Allen calls *projects*. Even after you call John about the refrigerator in the example above, there are still a number of steps to clean out the garage. You will learn more about keeping your projects organized in the next chapter, but initially you can keep a "Pending" stack tray.

Chapter 7 - *ORGANIZING*: SETTING UP THE RIGHT BUCKETS

The 5 Steps in the Getting Things Done (GTD) System				
I. Capture	II. Clarify	III. Organize	IV. Reflect	V. Engage

Once you finish *clarifying* WHAT each item is that you have to do (the previous chapter), you need to *organize* them by putting them where they belong. For example, if you want to keep something for later reference, it should go in your trusted filing system (not your e-mail inbox). If you want to call someone, it should go on a list of *Next Actions* under the category of 'Calls' so you'll remember to make this call at the right time. There is no one best way to set up your organization system, and you probably won't create it all at once. It will evolve and change as your needs change. As you empty your "in" for the first time, you will find that you have lists and piles of things that you will want to organize. The goal is to put items into categories that will work best for *you*, but below are eight suggested categories or buckets.

Below are eight buckets, or endpoints for items you have to do—seven of which need you to manage and track them, the eighth of which is just trash. These are the eight categories that were in red italics in the **WORKFLOW DIAGRAM** introduced earlier:

Calendar	*Project List*	*Someday/Maybe*
Next Actions	*Project Materials*	*Reference*
Waiting For		*Trash*

Keep in mind that you should keep very clear distinctions among these categories. For example, if you put an item on your *calendar* that really belongs on your *next actions* list, then you will stop trusting your calendar because you won't really know what *has* to happen on that day. If you put reference material in your stack you want to read, you'll go numb because that pile will become so large. While it might seem complicated to have all of these categories, all you really need to keep track of everything are lists and folders, kept in paper-based or electronic form. While many people have kept to-do lists for years, they may have never kept *organized* lists and as a result, either their lists are incomplete or they have items they never cross off. This is a new, more organized approach to keeping lists.

Organizing Reminders: Actions and Projects
The first time you go through your in-tray, you will end up with many actions that can't be done in two minutes, and which you can't delegate to anyone else. You will want to *sort* these items into groups that make sense and make sure to have reminders so you can track them and make sure they don't fall through the cracks.

Calendar—When processing your inbox, put all appointments for a specific date and time in your calendar. For items that must occur on a day but no specific time, enter those on the date. However, if there are items you *hope* to accomplish on Monday, resist the urge to put those on your calendar, because this will weaken the system. Reserve your calendar *only* for items that absolutely must be done on a specific date or a specific time.

Next Actions—It helps to create a list of next actions you need to complete that is organized by *context:* either the location or tool at hand. For example, your *Next Actions* list may be divided into: Calls, At computer, Errands, At Office, Read/Review, Emily, etc. These lists can be subheadings, separate lists, or folders, but either way they will help to serve as reminders. If you are out dropping off your dry cleaning, you can look at your errands list and see you also need to stop at the bank. It is more efficient to get these done together. If you have ten minutes with your phone while waiting for a meeting, you can plow through your phone calls if you have a list of Calls. If you have a number of questions to talk to your partner, Emily, about, if you have an "Emily" subheading or folder, you can ensure that you cover all of your topics and questions in one meeting when you have face-to-face time.

In contrast, if you just have one long list of 50 items to do, it's very hard to sort through them and know which items to do together and when to do them. It also helps with productivity if you are in computer mode to simply go through a list of computer items you need to complete. The categories you use must work for *you*. You might keep one list of items to discuss with your boss and one for your assistant. You might keep a physical folder of items to read, and keep it close by for those times a meeting is starting late or you are on a train. If your items to read are online, you might keep a file in your e-mail system for storing e-mails with content to Read/Review or a Surf Web action folder to keep e-mails with links to recommended articles, blogs, or videos. Sometimes rather than a list, you will have a physical reminder of what to do. For example, that folder of articles to review. Another example might be a stack tray labeled, "Bills to Pay" or a folder "Financial to Process." The physical items themselves might remind you to review the contents regularly, or you may want to add it to your *Next Actions* list to do these items.

Waiting For – This set of reminders was introduced earlier as a way to keep track of all of the things you're waiting for from others. Whether you're waiting for the theater tickets you ordered or an approval from someone to move on with a project, you need to keep a list of what you are waiting for, along with the date that you requested the items. Review this list as frequently as you need. It is helpful to keep this list close at hand, so if you find yourself meeting with someone who is responsible for an item on your *Waiting For* list, you can casually bring it up, "By the way, how's it going with the proposal?"

The Special Case of E-Mail: Rather than take the actions from your e-mails and enter them into a *Next Actions* list or a *Waiting For* list, because of the quantity, Allen recommends organizing e-mails within the e-mail program itself. You will want to create a few folders on your e-mail navigator bar for information you want to reference. Then you want to keep the "in" area only for your actionable messages. To keep this area from getting clogged, create one folder for any longer-than-two-minute e-mails that you need to act on, and then you will be able to see and act on the less-than-two-minute items more efficiently. You can also have a folder for items you are *waiting for*. To keep these at the top of your navigator bar, you can call them @ACTION and @WAITING FOR. Then when you are processing your inbox, you can quickly complete the shorter items, and drag the other items into the appropriate folder.

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Projects List - Creating one list of all of your projects really helps to ensure that nothing slips through the cracks. Keep in mind that you can't *do* a project (like 'Do Taxes'), you can only do the resulting action steps you come up with. Remember this is just an overview of the *titles* of all of your projects. There are no supporting materials or details about each project here; it's just a list. Do not attempt to organize this list by priority or size. Every week you will do a complete review of your *Projects List* (called the Weekly Review-to be described later) to ensure that action steps are clearly outlined and get added to the appropriate list: *Next Actions, Waiting For,* or *Calendar*. It will relieve a tremendous amount of stress if you can take the large number of unactionable projects (because, remember, you can't DO a project) from your brain and get them down on a *Projects List*. If you haven't already dumped these projects out of your mind, you must go through all of the places where they may reside, and write them down on your list: Are there projects lurking in your calendar, next action lists, workspaces? Are there recurring problems that really need to be clarified and turned into a project (like, "Look into improving Frederick's relationship with his school" or "Resolve problems with landlord.") What about your creative and personal side – are there projects there as well? Did you want to learn Italian or take an online course? We need to write down all of these projects so we can begin the process of identifying Next Action steps for them.

Project Materials – These are the materials and resources you need to support your work on each project. Keep in mind that these should *not* be used as reminders that you have something to do. Many people, unfortunately, do use the stacks of paper and folders associated with a project as a reminder that there is something to be done. This is just not efficient. Instead, keep these support materials organized in digital or physical files, and make sure that the next action steps are listed on either your *Next Actions, Waiting For,* or *Calendar*. As you have new thoughts about a project, you can capture those thoughts in a variety of ways. If you're keeping a *Projects List* within some type of digital software, most organizing software programs allow you to attach a digital note. There are many digital tools you can use that help with project management and group sharing. Of course you can choose a paper-based system and set up one file folder for each project you're working on. Or you can even use a notebook with a few pages set aside for each project. Whatever approach you choose, it is vital to maintain an overall list of the projects you are working on.

Reference – A big problem with people's organizational systems is that they keep non-actionable items together with their actionable items. This makes it difficult to determine which next steps to take, because your in-tray may be flooded with items that require no action. Our in-trays or e-mail inboxes are often stuffed with reference materials that we really only need access to someday. To store their reference information, most people end up with one to four drawers of file folders in addition to e-mail reference folders and other digital folders. Keep in mind that any project or topic that uses more than fifty folders should be given its own section, drawer, or digital database with alpha-sorted files. For example, if cooking is your hobby, then you might have an entire section just for that. For work, you might have an entire section for all of the contacts or people in your network with information about each person. These sections are in addition to your general-reference files that were introduced earlier. Remember reference files should be organized *simply* by using an alphabetical system to make it easy to find what you need to retrieve.

Someday/Maybe – If you haven't already done it, one of the lists you want to create is a *Someday/Maybe* list. This will be a place where you can capture unlimited ideas about what you might want to do someday, "Learn Spanish" or "Climb Mt. Washington." This list can include anything from things to do for your home, hobbies, skills to learn, clothes to buy, organizations to join, trips to take, service projects to contribute to, things to see and do, and more. You might even want to take a realistic look through your *Projects List* and move any items that you don't plan to do in the next few months to your *Someday/Maybe* list.

Using a *Calendar* to Trigger Things You *Might* Want to do: Now that you have a list of projects in your *Someday/Maybe* list, and you may also have some projects in your *Projects List* that you don't want to start right now, you need a system to remind you of these projects or tell you when to consider starting them. One place to put this reminder is on a specific day (not time-slot) in your calendar. If you have a meeting coming up, you might want to include a note in your calendar a week before to write the agenda. If there is a birthday coming up, choose a date to buy a gift. If you get invited to a conference way in the future, you might put off deciding whether to go by entering "Decide about conference" on a later date in your calendar. This allows you to put your mind at ease about not deciding now, because you know there will be a trigger on your calendar to remind you to decide later.

Using a "*Tickler" File* to Trigger Things You *Might* Want to do: This is a helpful three-dimensional version of a calendar you can use to keep track of things to do in the future. It is a simple file-folder system (that may stand up on your desk) with files for each month of the year, and daily files just for the current month you are in. Allen has used one of these for years! To set it up, you need 12 files, one for each month, labeled "September," "October," etc. and 31 files labeled "1" through "31." These daily files are kept in front. If today is October 5, then the first file would be "6" and files "7" to "31" would be behind that. Then "November" would be behind the "31" and next would be files "1" through "5" since those dates already passed. Each day, the contents of the file with that date are dumped into your in-tray, and the file is stored behind the rest of the daily files. When you get to the "November" file, its contents are distributed among the days in November. This system allows you to store actual documents. For example, if you create an agenda for a meeting next week on October 12th, you can file it in the "12" file. If you say to your assistant, "Remind me about the Hong Kong trip two weeks ahead of time" he or she can put a note in the tickler system. It's like your own personal postal system that allows you to mail things to yourself with a set arrival date.

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A Word About Checklists: The systems above help you deal with the work that comes your way. But how can you make sure you are considering all of the parts of your work or personal life that need attending? There may be certain larger categories that you want to review regularly, and it can help to create a checklist. For example, for work, you may want reminders of these important areas:

• Team morale • Processes • Timelines • Staff issues • Workload • Communications • Technology

In your personal life, your checklist might include other areas that you hold important:

• Career goals • Service • Family • Relationships • Community • Health • Finances • Creativity

You can use a checklist for anything you want to review regularly or any procedure you want to repeat: "Things to Take Camping" or "Weekly Review: Things to review or update on a weekly basis" or "People to Stay in Touch with." With the creation of a few checklists, you have now *captured, clarified,* and *organized* your stuff, and you are now ready to *reflect.*

Chapter 8 - *REFLECTING*: REVIEWING AND UPDATING YOUR LISTS

The 5 Steps in the Getting Things Done (GTD) System				
I. Capture	II. Clarify	III. Organize	IV. Reflect	V. Engage

The whole point of an organized workflow management system is to free up your brain so you can do larger thinking and be more present. However, this will only happen if you do two things regularly: review the items you have to do and make sure your system is up-to-date. That is exactly what this fourth step, *reflecting*, is all about: reviewing all of your lists for what to do when, and updating all of your lists so that everything you want to do is captured on those lists.

What to Look At When: When you arrive at work, how do you know what to look at and when? The first place you will want to look is your daily *calendar* and if you have one, your daily tickler file (introduced in the previous chapter). The calendar outlines the "hard landscape" – exactly where you have to be and when on that day. If you have meetings all day other than one free half hour, this will help you make decisions about what other work to do. Second, you will want to look at your *Next Actions* lists. This might be one list with subheadings for Calls, Computer actions, In-office to-do items, etc. or actual separate lists, including those items in your e-mail inbox. This doesn't mean you are *doing* the items on these lists yet, it just means you will want to review them to know which actions to do at which point during the day. Keep in mind that you will also review a number of your lists on an as-needed basis. If your boss pops in, you'll glance at your list of things to discuss with her. If a meeting ends early and you have your phone with you, you'll review the list of phone calls you need to make.

Updating Your System - The Weekly Review: They key to keeping your organizational system running is to regularly step back and review it. This is going to be difficult if you fall too far behind, so to avoid this, consider implementing the Weekly Review. Carving out this time will allow you to catch up with your *capturing, clarifying*, and organizing, and let you evaluate your important projects. During this time, you actually go through the workflow management steps--*capturing, clarifying*, and organizing--so that you can get clear, get current, and get creative. It will be difficult to do, but you need to force yourself to take a break from the daily grind and the endless flow of urgent items and carve out two hours for your Weekly Review. The best time to do this is during the early afternoon of your last workday (often Friday) or if you just can't do that, take two hours at your favorite café on Saturday mornings.

Each week you will accumulate new notices, receipts, texts, meeting notes, articles, and more that you will want to *capture* during your Weekly Review. As you remember, the goal is to get "in" to empty. Next, to "get current" you will need to do the following:

(1) Review *Next Actions* lists, cross off items you've completed, and add any new items.
(2) Review the past week's *Calendar* to see if any events trigger a memory of action items you need to add to your *Next Actions* lists.
(3) Look at upcoming *Calendar* events to see if you need to plan by adding items to your *Next Actions* lists or *Projects List.*
(4) Review your *Waiting For* list to see if you need to follow up with anyone and cross off completed items.
(5) Review your *Projects List* to check the status of your projects and add any new to-do items to your other lists.
(6) Finally, review any other checklists to see if there is any other part of your work or personal life that needs attending.

The goal of the Weekly Review is not simply to plow through the minutiae, but to remove barriers to larger, more creative thinking. Give yourself the mental space to take advantage of your newly cleared mind to get creative. Examine your *Someday/Maybe* list or allow yourself to think about any new harebrained ideas that have occurred to you recently to see if you want to act on these ideas.

The "Bigger Picture" Reviews: Certainly not every week, but every so often, you will want to take stock of the larger picture. Is your work following the key goals and objectives you've set out? What should you have in place one to three years from now? How is your career going? How fulfilling is your current lifestyle? Again, the purpose of the GTD method is to free you up to more regularly engage in these higher levels of reflecting. Keep in mind that it may take a good one to two years before your workflow management system is fully in place and perfected before you may be able to regularly conduct bigger picture reviews.

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Chapter 9 - *ENGAGING*: MAKING THE BEST ACTION CHOICES

The 5 Steps in the Getting Things Done (GTD) System				
I. Capture	II. Clarify	III. Organize	IV. Reflect	V. Engage

It's 9:22am on Wednesday morning - what should you do first? How should you decide what to do at any particular point during the day? This is the final step in the GTD system in which you actually *do* the work after having *captured, clarified, organized,* and *reflected* on it. Below are three models to help you decide what to do when.

The Four-Criteria Model for Choosing Actions in the Moment
At the most mundane level, you need to decide what to do at any given moment during the day. As was outlined in Chapter 2, you can use the four-criteria model in this *order*:

1. **Context**: First consider what you can do given *where* you are and the *tools* you have. If you have a phone, what's on your calls list? If you have someone in front of you, what's on your agenda list for this person? If you are out, what's on your errands list? Remember that you will have your *Next Actions* lists organized by context (Calls, At Computer, Errands, etc.) so you can scan the appropriate list given the context you have. If you don't divide your to-do list like this, you'll have to scan an enormous list when all you need to see are the outside errands you have to do.

2. **Time Available**: After context, the next criterion to consider is the time you have. You will choose different actions to do depending on whether you have ten minutes before your next meeting or a block of two hours.

3. **Energy Available**: After context and time, consider your energy level. The end of the day is probably not the best time to make important decisions; instead, change an airline reservation. You also might be in the middle of a three-hour block of time and just need to change your focus to get a few easy wins, so you choose something quick on your list. Some people even create categories in their lists (along with Calls, At Computer, Errands, etc.) like "Less Than 5-Minutes" or "Brain Gone" for those times when they have no energy and need activities that require no thinking at all. If you don't have your tasks organized well, you may attempt a challenging task and get absolutely nothing done.

4. **Priority**: Finally, of all of the tasks to do given the context, time, and your energy level, which do you choose to do first? This depends on your priorities. This is a complex decision that must be based on your goals, values, and the direction of your organization and your life. Below will provide some assistance with this, but you can also use your intuition and your heart.

The Threefold Model for Evaluating Daily Work
During your day, you will be engaged in one of three types of work: (1) **Doing Predefined Work**, (2) **Doing Work as it Shows Up**, and (3) **Defining Your Work**. The problem is we tend to get sucked into the second type of work more readily: managing the crises as they arise. Somehow, we are more easily seduced into managing these surprises than taking the time to capture, process, organize, review and do the predefined work. It's easier to attack the "urgent" and feel "busy." If our boss shows up and wants some time or if our baby develops a cough, we drop what is in our in-tray and attend to these more pressing situations. This is an appropriate judgment call, but the only way we can attend to the urgent is if we feel confident that we know what we are *not* attending to. We need to know how relatively important the unexpected crisis is in comparison to the work in our in-tray. The only way to know this is if we consistently follow the GTD steps. But even if you know all of the work you have to do, how do you decide whether to stop what you are doing and take care of the unexpected? You need to have a sense of the larger context as described in the final model below.

The Six-Level Model for Reviewing Your Own Work
Any item that you have to do can be looked at from six levels, or horizons. as Allen describes it:

Horizon 5: Life	*Horizon 2:* Professional and personal life areas of focus
Horizon 4: Long-term visions	*Horizon 1:* Current projects
Horizon 3: One- to two-year goals	*Ground:* Current actions

The idea is that any time you are making a decision about what to do, it should align with and enhance the levels above it. For example, if the phone call you plan to make (*ground*) clashes with your life purpose (*horizon 5*) then you shouldn't make it. On the other hand, a phone call (*ground*) that helps you increase sales (*professional areas of focus*) and this helps you move up the career ladder (*horizon 3*) then this may get you closer to the life you want to live (*horizon 5*). You could start from the top and move down: decide why you exist, then decide on the lifestyle you want, then what kind of job and relationships would support this, and so on. However, although many organizational experts would suggest this, Allen believes it is most effective to start at the *bottom*. Practically, if you can't get the details of your life in order, it is harder to find the mental space to think about your life's purpose. Most leaders are burdened by the details of managing their workloads—e-mails, meetings, projects—that once they get this under control, they become freed up to think about family, career, and quality of life.

The rest of the book goes into more depth about what has already been presented, but is not included due to space restraints.

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THE MAIN IDEA’s PD ideas for *Getting Things Done*

I. Set Up and Try the *Getting Things Done* System Yourself

Here are some steps you can follow to set yourself up with the GTD system before the school year starts or at the beginning of the school year. Of course, the book provides *all* of the details you need to set this system up – that’s the point of the book – so this is just an overview. Note that these are the steps you would follow THE FIRST TIME to set up this system.

Before setting up the system, here are a few things to put in place to get ready:

1) Shop for the materials you need (see p.3 of the summary), but you probably have these office products already.

2) Decide whether you will use a paper or electronic system (or a mix) to capture your to-do items and keep lists (such as *Next Actions, Projects List, Waiting For,* and *Someday/Maybe* lists).

3) Keep the Workflow Diagram easily accessible while you learn the system. Post it above your desk or keep the image on your phone:

<table>
<tr><th colspan="9">THE WORKFLOW DIAGRAM: How to Clarify and Organize Your “Stuff”</th></tr>
<tr><td colspan="9">Capture Tools: Collect everything in your in-basket or device</td></tr>
<tr><td colspan="9">What is it? Is it actionable?</td></tr>
<tr><td colspan="6">YES</td><td colspan="3">NO</td></tr>
<tr><td colspan="2">Multistep Projects</td><td colspan="4">One-Step Actions</td><td>Trash</td><td>Someday/Maybe</td><td>Reference</td></tr>
<tr><td>Projects List</td><td>Project Materials</td><td colspan="4">Takes less than 2 minutes?</td><td colspan="3"></td></tr>
<tr><td colspan="2"></td><td>Yes</td><td colspan="3">No</td><td colspan="3"></td></tr>
<tr><td colspan="2"></td><td>Do it</td><td>Delegate it</td><td colspan="2">Defer it</td><td colspan="3"></td></tr>
<tr><td colspan="2"></td><td></td><td>Waiting For</td><td>Calendar</td><td>Next Actions</td><td colspan="3"></td></tr>
</table>

4) Clean up and organize your reference system - both paper and electronic. This will take the longest time, but most of what is clogging up your e-mail inbox and what is piling up on your desk are items to file away. So take some time to ensure that your computer files and paper files are organized in a clear and simple way (remember Allen advocates using an A-Z system) so you can file anything in under a minute. Also take the time to create some folders in your e-mail inbox (usually under the navigator bar on the left) for e-mails that require more than a 2-minute response. These might include ‘Read/Review,’ ‘To Surf on Web,’ or ‘Waiting For.’ (Allen even suggests labeling like this so they remain at the top ‘@READ/REVIEW.’

⇨ Set a deadline here for completing the four items above: _________________

1. In order to (1) ***capture*** all of the tasks that come in the very first time you try this approach, you must first:

A. Set up some type of “in-tray” to gather everything you have to do.

B. Now, literally dump every task you have to do into “in.” This means you need to first gather every *physical* paper with a task to be done (calls to answer, forms to fill out, agendas to file, etc.) Next, dump all of the tasks you are carrying around in your head (speak to Carol, plan next Monday’s PD session, etc.) onto papers to put in the “in tray.” Below are ideas to jog your memory of what you need to do:

Professional:	“Look into” projects	“Outside” organizations to contact	Phone calls to make	Staff to hire		
	Reports to submit	Articles to write	Articles/books to read	Getting feedback from staff		
	Upcoming meetings	Planning upcoming events	Staff development			
Personal:	Skills to develop	Books to read	Clothes	Friends	Returnable items	Upcoming events
	Taxes	Pets	Home repairs	Vacations	Doctor appointments	Children

⇨ Set a deadline here for ***capturing*** all tasks (this can take hours): __________

2. Before you (2) ***clarify*** what each item means for the first time, you need to set up the following “buckets” or endpoints. These are all in red in the diagram above and they are where all of your “stuff” in the in-tray will end up:

A. Set up a paper or electronic *Projects List.* This is just a running list, in no particular order, of the *names* of all of your projects (any task that takes more than one step), not the materials for the projects or the steps involved in the projects.

B. Set up physical or electronic file folders for *Project Materials* for each of your projects.

C. Set up a paper or electronic *Waiting For* list. This is just a list of what you are waiting for, from whom, and the date requested.

D. Make sure you have a working *Calendar*, preferably electronic. In addition, you may want to set up a tickler system like the one Allen describes (see p. 8 of the summary) with files labeled January through December, and 1 to 31.

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E. Set up a physical or electronic list called *Next Actions* to organize your one-step tasks by context. For example, here are some sample subcategories you may want to organize your tasks into: Calls, At computer, Read/Review, To Discuss with Administrative Assistant, To Discuss with Superintendent, Classroom Observations, etc.

F. Create a paper or electronic *Someday/Maybe* list for the tasks you hope to do someday, but not in the next 3-6 months.

G. You should have already cleaned up and organized your physical and electronic *Reference* file folders including throwing out what you don't need. If you haven't, do so now.

⇨ Set a deadline here for preparing to ***capture*** all tasks. When will you have these 8 buckets set up by? _________

3. Now it is time to actually (3) ***organize*** these items into one of the eight buckets you've created:

A. To organize all of your "stuff" from your in-tray and your e-mail inbox, you will need to go through each item **one at a time**. When you process your e-mail, start with your most recent one. When you process your in-tray, take out only one item at a time, starting at the top. Never put anything back into "in" and never start with the "fun" stuff - be methodical and get to each item!

B. Process your in-tray and e-mail now. Here is a quick way to think about how to get all of your "stuff" into the 8 red buckets:

<u>Nonactionable Items</u>*:* If an item requires no action now, this means you are either going to throw it in the *Trash,* add it to your *Someday/Maybe* list, or file it (easily, within one minute) in your electronic or physical *Reference* files.

<u>Actionable Items</u>*:* If an item requires some action, then you will either:

Do It: Rather than putting this task somewhere, simply do it yourself now if it can be done in under 2 minutes.

Delegate It: Add these items to your *Waiting For* list and pass these to the appropriate person.

Defer It: Put these items in your *Calendar* (or in your calendar tickler files) or add them to your *Next Actions* list in the appropriate section (for example, phone calls get added to the "Calls" section). If the item is a project, add the name of the project to your *Projects List* and put any materials for projects into a file of *Project Materials* for that project.

⇨ Set a deadline here for ***organizing*** everything from your in-tray and e-mail inbox into one of the 8 buckets____________

4. In order to (4) ***reflect*** on which items to do when, you must first:

A. Choose a time for your Weekly Review that will be as sacred as possible. This could be Friday evening, Saturday morning, or Sunday afternoon. Keep in mind that you need to set aside several hours because you are fitting in the following:

(1) Review *Next Actions* lists, cross off items you've completed, and add any new items.
(2) Review the past week's *Calendar* to see if any events trigger a memory of action items you need to add to your *Next Actions* lists.
(3) Look at upcoming *Calendar* events to see if you need to plan by adding items to your *Next Actions* lists or *Projects List.*
(4) Review your *Waiting For* list to see if you need to follow up with anyone and cross off completed items.
(5) Review your *Projects List* to check the status of your projects and add any new to-do items to your other lists.
(6) Finally, review any other checklists to see if there is any other part of your work or personal life that needs attending.

B. Now you need to make the Weekly Review a habit, or the whole system will fall apart. As Charles Duhigg describes in *The Power of Habit*, our habits consist of a cue, a routine, and a reward. To make the Weekly Review a habit, you need to plan for these three components. What will be your *cue* that it is time for the Weekly Review? A weekly timer, waking up early on Saturdays, or bringing yourself to the same café each week to do it? Next, you complete the *routine* (see the 6 steps above). Finally, to solidify this routine, think of a reward you will consistently use. Perhaps you make yourself a cup of coffee. Or maybe the sight of a clean and organized desk area is enough of a reward. In addition to planning your cue-routine-reward cycle, also consider potential obstacles. What will you do if you plan your Weekly Review for late Friday afternoons and a crisis arises? What if you are just too tired? Having a plan in place to address obstacles will help you develop this new routine.

5. In order to (5) ***engage*** in doing the actual tasks, you must first be aware of how to choose which task at which time:
For the next few days, practice choosing your next actions based on: Context, Time, Energy, Priority. Consider the *context* (do you have your phone? Your reading materials?), the *time* (do you have 10 minutes or an hour?), your *energy* level (is it the beginning or the end of the day?), and your *priorities* (based on your goals, what is the most important thing to get done now?) After practicing this for a week, reflect on how well you are making these decisions.

II. Introduce the *Getting Things Done* System to Your Teachers

Imagine if every time a teacher asked a colleague to do something, the teacher requesting the item could completely count on her colleague to do it? Imagine if any time you, as the leader, reminded teachers about an upcoming event, you could count on them, 100%, to put this item on their calendars? This is what happens when *everyone* in a school utilizes an organizational system like the GTD system. Teachers and staff have a tremendous number of tasks to keep track of and complete. Consider introducing the 5 steps in the GTD system at a staff meeting as a way of reducing stress and making your whole school more efficient at the same time. *Or*, ask for a group of volunteers to implement this as a pilot, hold each other accountable, and report back to the rest of the staff about their feelings of organization and stress levels. A pilot like this may provide just the incentive the rest of the staff needs to get on board!

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