The Basics of Getting Things Done
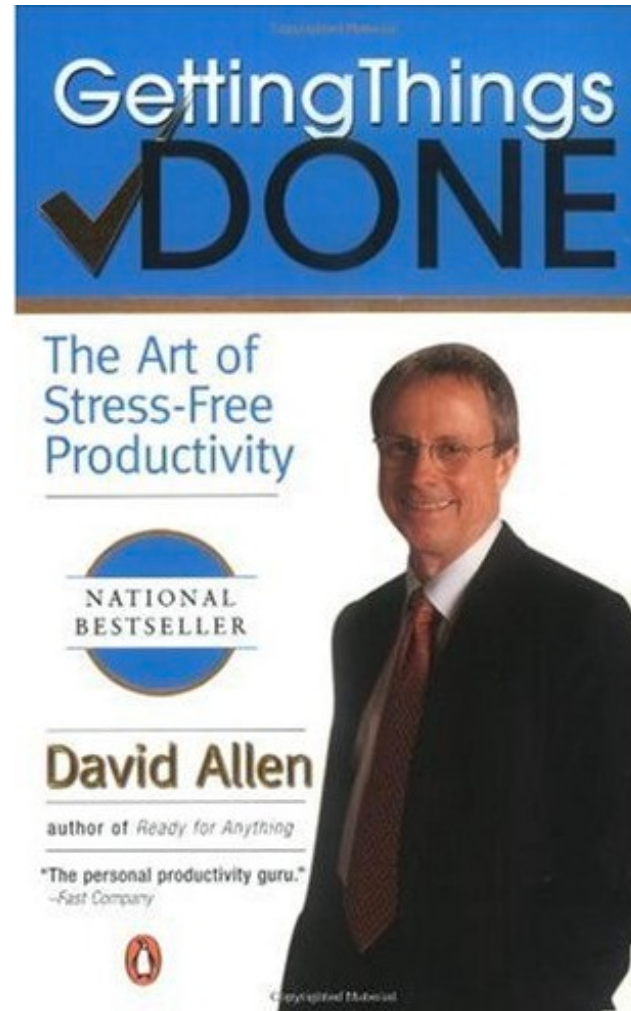
UNI FREIBURG

AiS Autonomous Intelligent Systems

Cyrill Stachniss

Getting Things Done

… or the art of stress-free productivity

http://www.amazon.com/Getting-Things-Done-Stress-Free-Productivity/dp/0142000280

Motivation for GTD

- The boundaries of today's work are not clearly defined anymore

- Traditional to-do list do not really correspond to the way people work today

- There are many more inputs today (email, text msgs, mobile phones, …)

- The volume of input is higher and it arrives faster than 20 years ago

Problems of Knowledge Workers

- **Procrastination**
- **Avoiding things** you should do
- There are items that **always stay** on your to-do list
- Although you think you plan things well, they sometimes get **out of control**
- Although you worked a lot, you have the feeling of having nothing really accomplished
- You feel that there is **too much stuff to do**
- Things pop up to your mind in situations when you cannot do anything about them
- You do not have a **clear mind**

GTD Aims

Providing strategies for how to

- be more **relaxed** and less stressed
- **accomplish** more
- be more **creative**
- keep **track** of relevant things

by supporting to

- define your work and priorities
- help to organize and structure your work

Creativity Needs a Clear Mind

Image courtesy by Ming Gong; © by Ming Gong, 2009, minggongphotography.com

Why are Things on Your Mind?

- You have **not clarified** the indented outcome

- You have not decided what the physical **next action** towards the outcome is

- You have not put reminders of the outcome and action in a system that you truly **trust**

Transforming "Stuff"

- A lot in GTD is about the transformation of "stuff" to clear your mind

- **"Stuff"** is **everything** in your physical or psychological world that it is **not where it belongs to** or for which you **have not defined a desired output**

The Need of a Trusted System

- Our mind often reminds us about things on which we cannot do anything at the moment

- As soon as your brain knows that your ideas, goals, and actions are stored in a safe place, it will stop reminding you

- So **capture everything** an store it in a **trusted system**

- GTD is about transforming stuff but also about managing your trusted system

The Ideas of GTD on One Slide

- **Identify** all the stuff in your life that is not in the right place

- **Get rid** of the stuff that is not yours or you do not need right now

- **Create** a right place that you trust and that supports your working style and values

- **Put** your stuff in the right place, consistently

- **Do** your stuff in a way that honors your time, your energy, and the context of the given moment

- **Iterate** and re-factor mercilessly

Five Key Steps of the (Daily) GTD Process

- **Capture/Collect**
- **Process**
- **Organize**
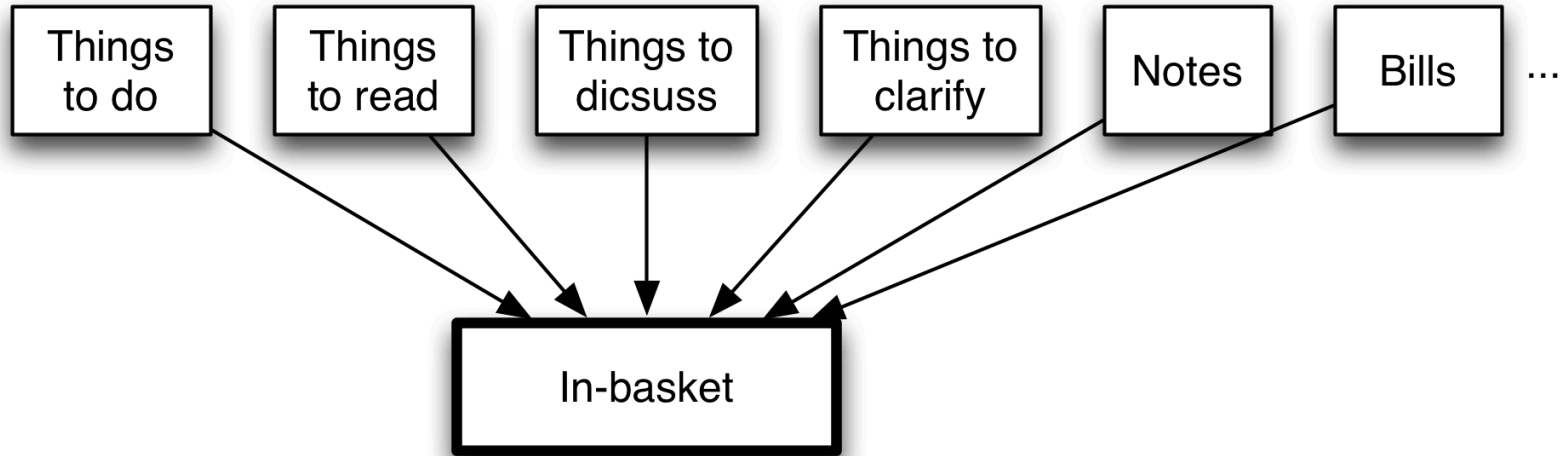- **Review**
- **Do**

Step 1 – Capture/Collect

- **Capture** every idea, to-do item, or thought that is worth to remember
- Capturing it means to safely store that information in an inbox/in-basket
- Have safely stored the thought is the first step towards doing an action
- The thought is off your mind – your mind does not need to remind you anymore
- **Empty** the inbox **regularly**

Step 1 – Capture/Collect

stuff

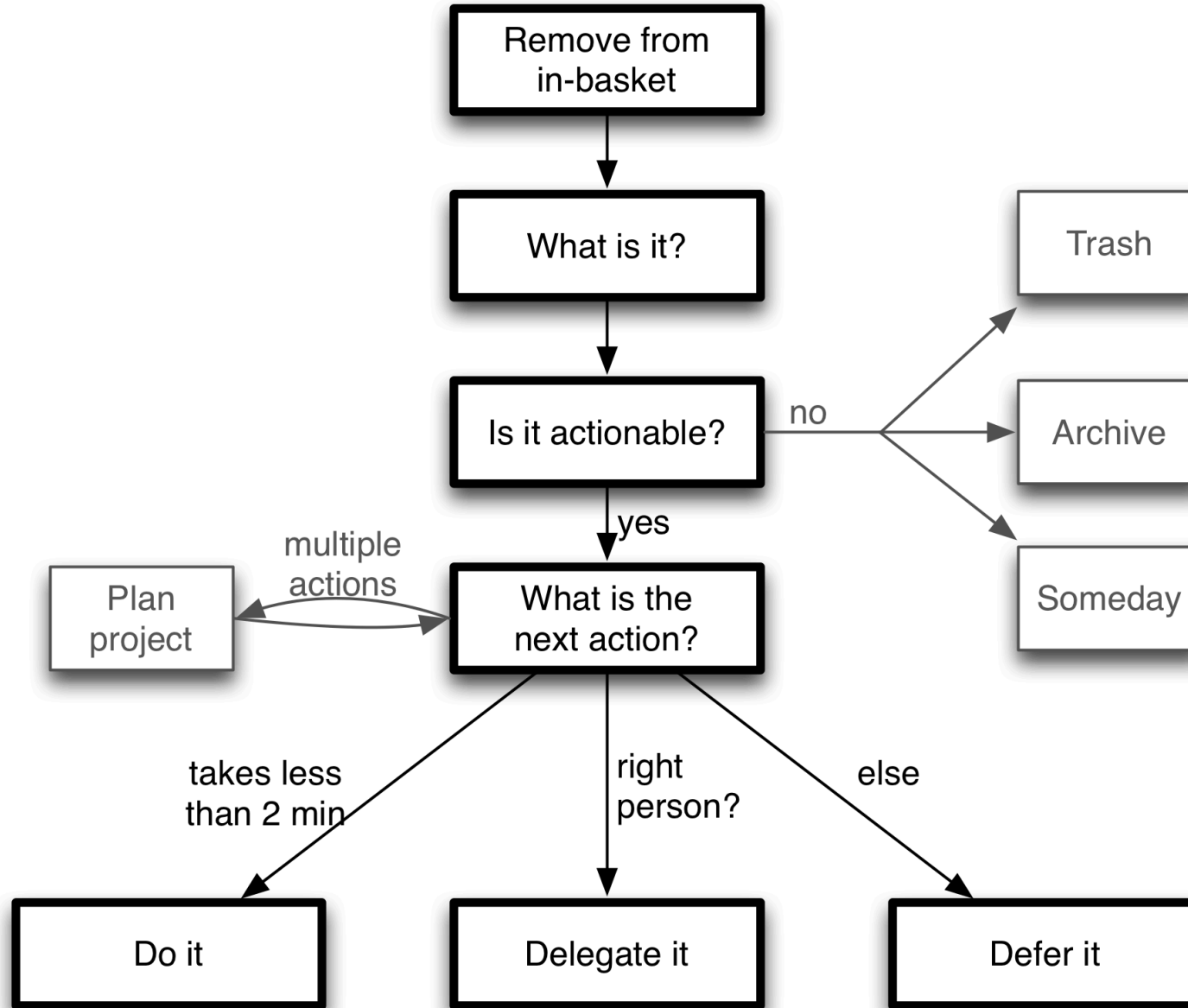| Things to do | Things to read | Things to dicsuss | Things to clarify | Notes | Bills | ... |

In-basket

Step 2 – Process

- **Processing** means to look at the captured things and to decide what to do with it
- Steps of processing stuff
    - Remove it from the inbox
    - Identify what it is
    - Identify if it is actionable
    - Identify the direct next action
    - Decide what to do with that next action

Step 2 – Process

```
                    ┌─────────────────┐
                    │   Remove from   │
                    │    in-basket    │
                    └────────┬────────┘
                             │
                             ▼
                    ┌─────────────────┐
                    │   What is it?   │
                    └────────┬────────┘
                             │
                             ▼
                    ┌─────────────────┐   no    ┌──────────┐
                    │ Is it actionable?│───────▶│  Trash   │
                    └────────┬────────┘         └──────────┘
                             │ yes              ┌──────────┐
        multiple actions     ▼             ───▶│ Archive  │
 ┌────────┐         ┌─────────────────┐         └──────────┘
 │  Plan  │◀───────▶│   What is the   │         ┌──────────┐
 │ project│         │  next action?   │     ───▶│ Someday  │
 └────────┘         └────────┬────────┘         └──────────┘
              takes less    right     else
              than 2 min    person?
         ┌──────────┐  ┌──────────┐  ┌──────────┐
         │  Do it   │  │Delegate it│  │ Defer it │
         └──────────┘  └──────────┘  └──────────┘
```
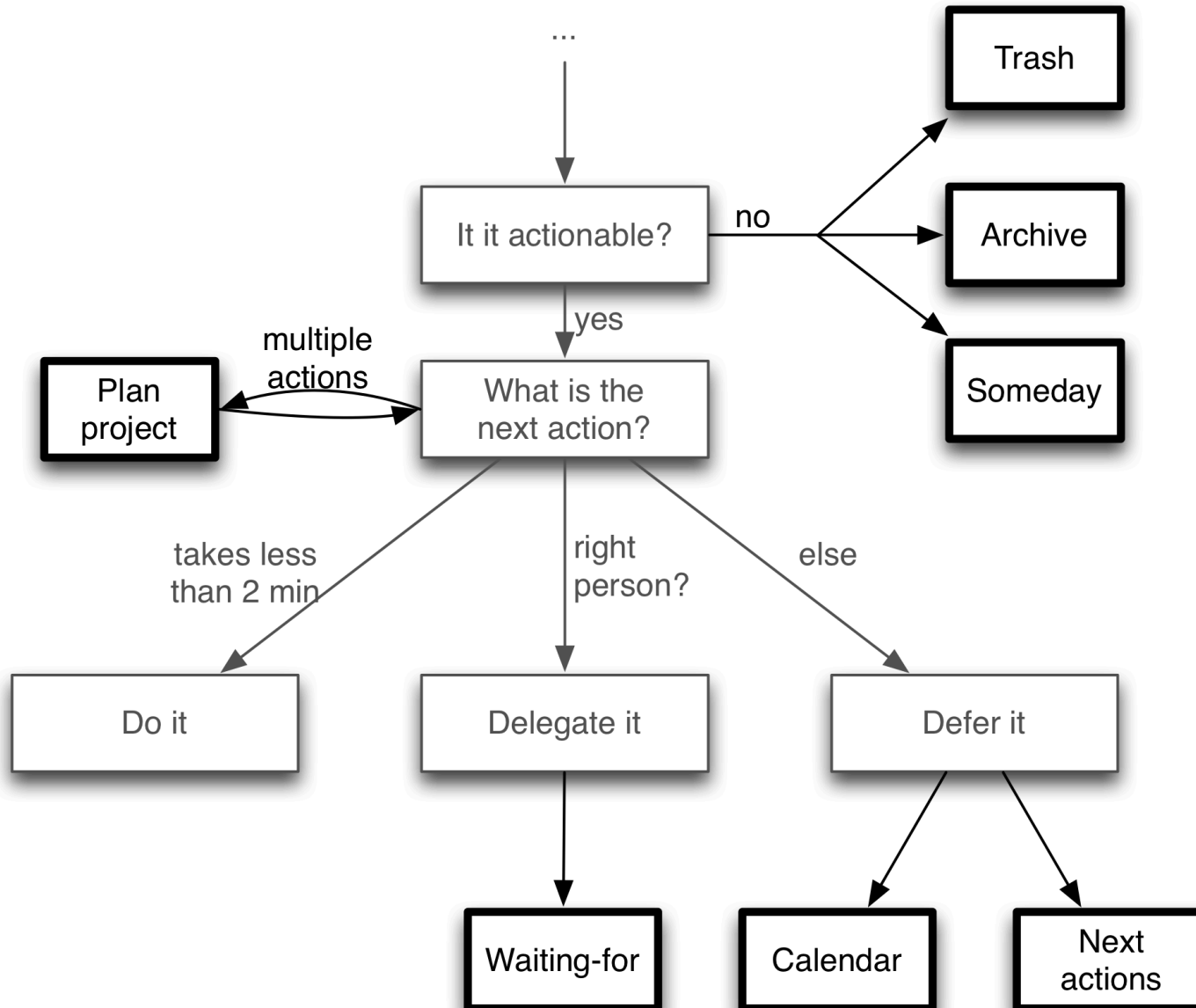
The Need of Contexts

- Most actions have a context – only in this context you can do the action

- E.g., no need to remind you at work that you have to fix a lap at home

- Grouping actions by context also allows you to reduce context switches while performing actions

Step 3 – Organize

- **Organize** the items and actions
- Project planning
- Waiting-for material
- Time planning/calendar
- Update project support material
- Not actionable items
    - Trash
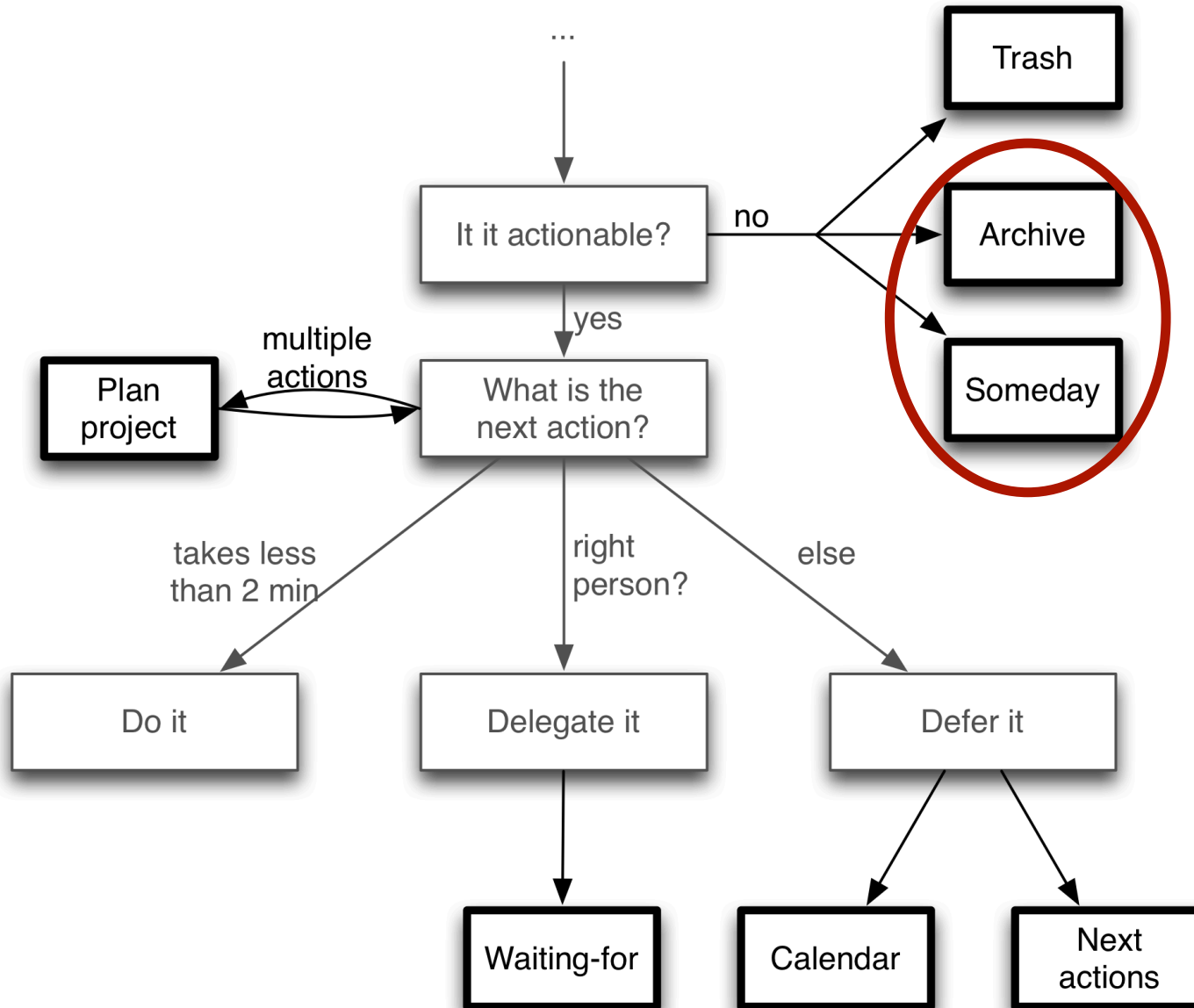   - Archive/reference material
    - Someday/maybe items

Step 3 – Organize

Step 3 – Organize

The Archive

- A system to store non-actionable items
- Easy to add and retrieve material
- A good archive is essential for GTD
- You need to trust your archive
- Often, you will need two systems

Digital

- Papers/Tutorials
- Slides
- Project material
- Emails
- …

## Paper-based

- Official documents
- Letters/bills
- Tax
- …

The Paper-based Archive

- Typically a traditional folder system
- Own folders for larger projects/topics (e.g., tax, credit card bills, …)
- A-Z filing systems for everything else

The Digital Archive

- Modern computer systems have quite good search engines (e.g. spotlight)

- Many systems support tags for efficient classifications

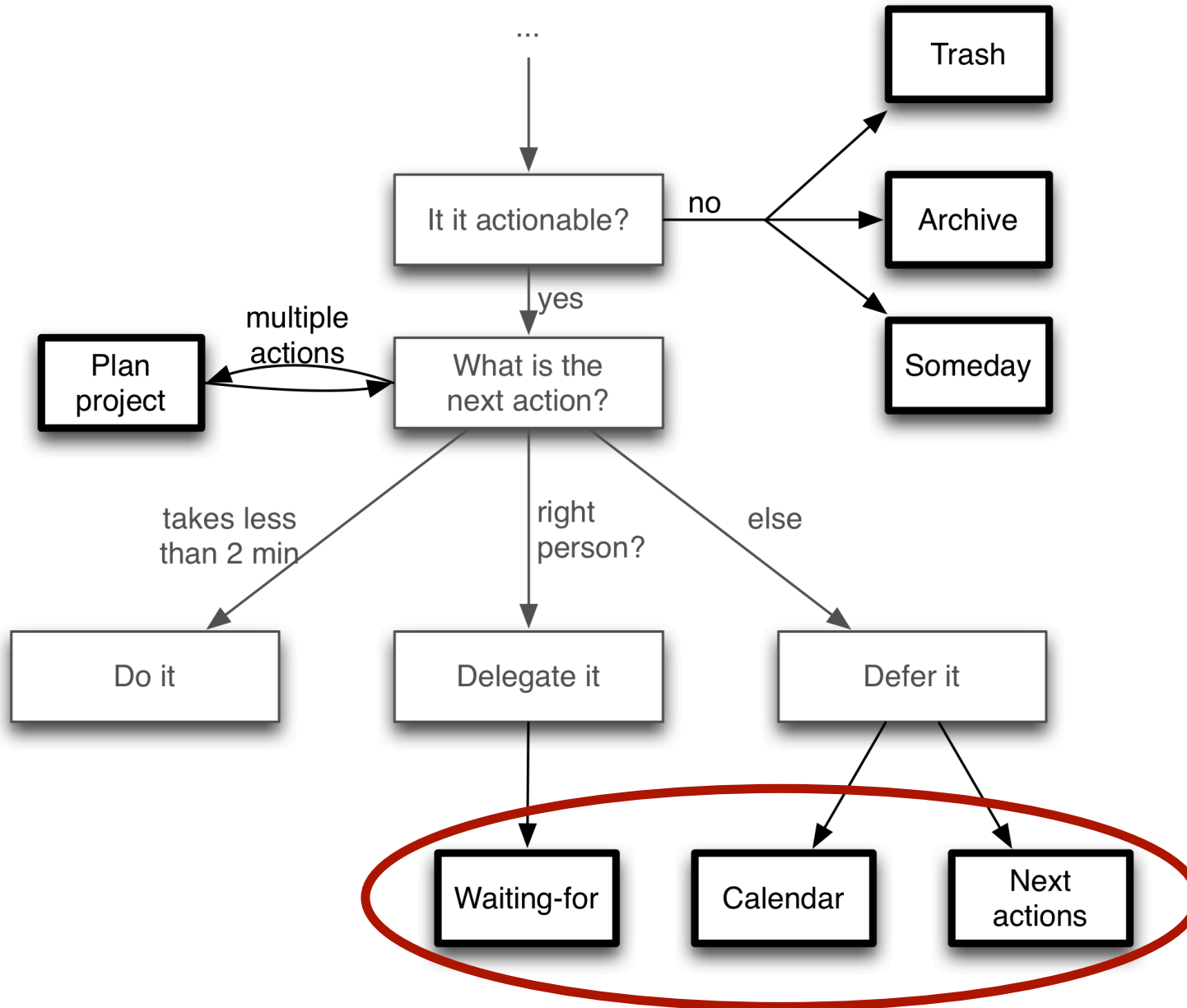- I tend to separate email from the rest (I simply receive too many emails)
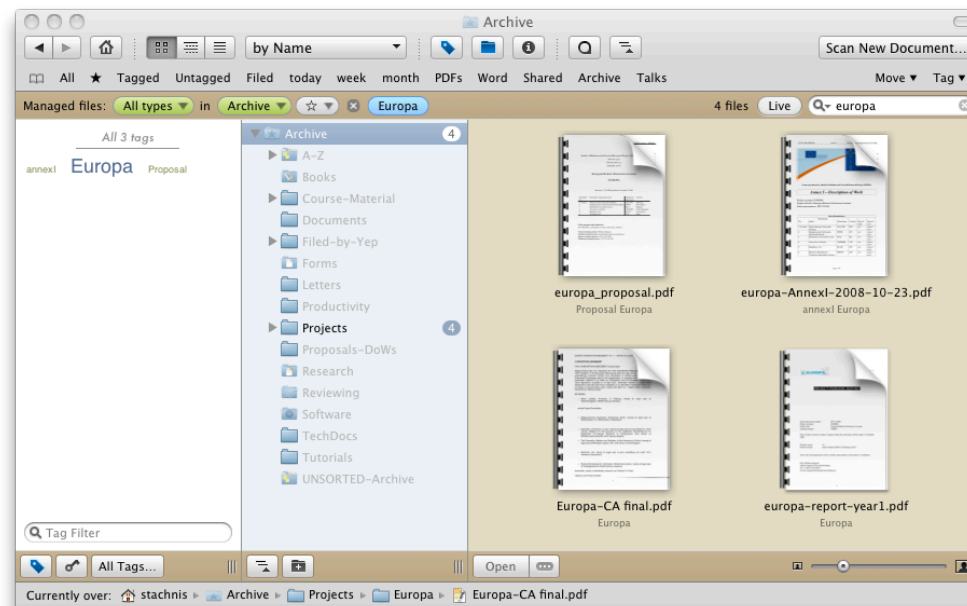
Example: Yep2

The Someday/Maybe List

- Things you want to do but not now
- "Parking lot" for ideas that should not be lost but do not fit in your current plans
- Examples
    - Travels to make
    - Learn Spanish
    - Books I might want
- This list is not a second trash bin
- Needs to be reviewed frequently

Step 3 – Organize

...

It it actionable? — **no** → Trash

Archive

Someday

↓ **yes**

Plan project ←— **multiple actions** —→ What is the next action?

What is the next action?
- **takes less than 2 min** → Do it
- **right person?** → Delegate it
- **else** → Defer it

Delegate it → Waiting-for

Defer it → Calendar

Defer it → Next actions

The Waiting-for List

- Whenever you delegate a task, make sure you track it

- Do forget things because your reminder is the reply or input of someone else

- A waiting-for list is a very powerful tool that helps to keep things under control

- Define deadline when to re-contact a person if you received no reply
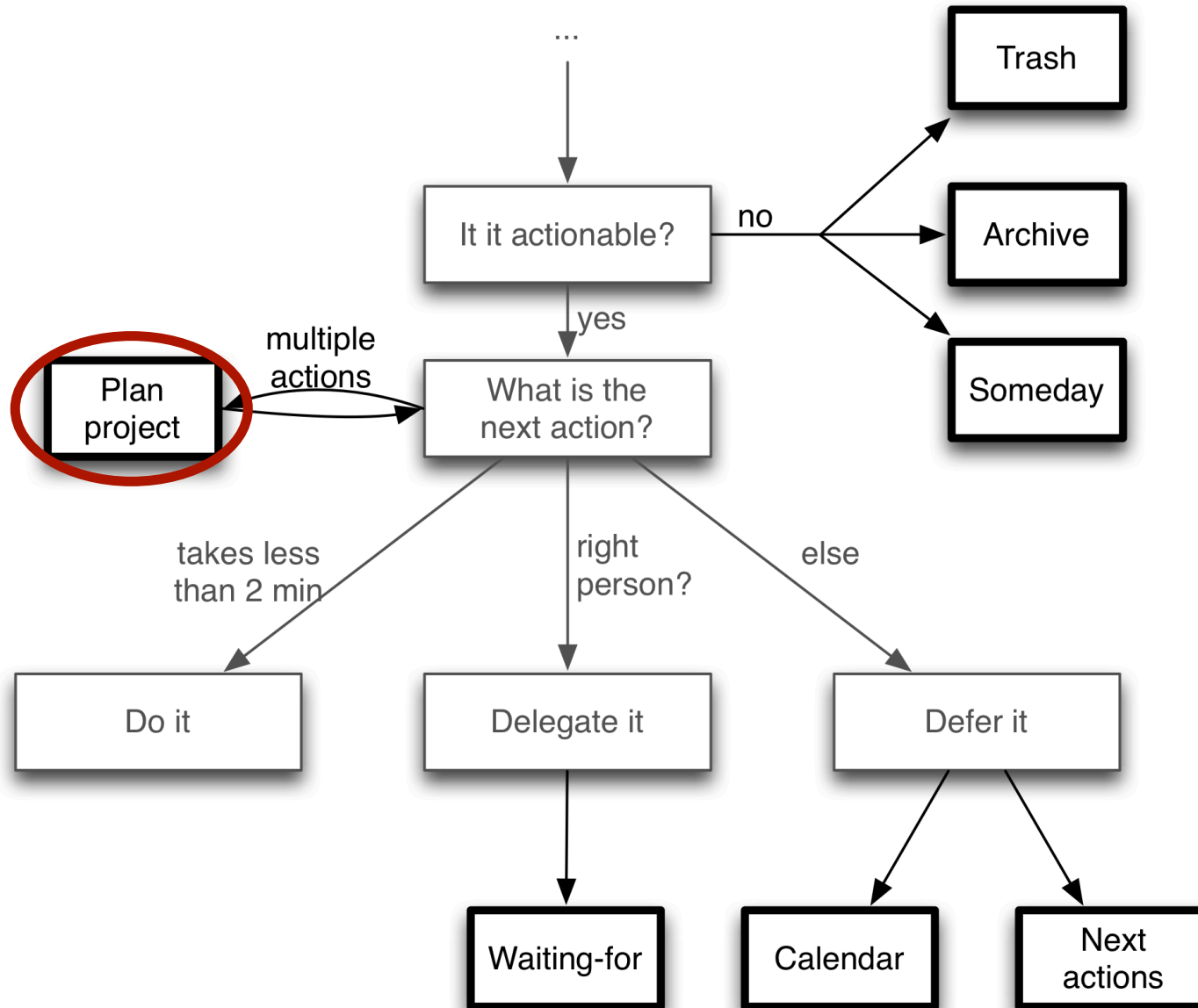
The Calendar

- Calendars are common and powerful tools to organize dates ad deadlines

- The calendar should only host time- or day-specific events or information

- Treat you calendar as a holy territory – only add what is really relevant

- Do not plan what actions you intend to do in your calendar – distractions will mess up the schedule anyway in reality

The Next Actions Lists

- The lists that host all your next actions

- Formulate them as actions
  ("Call Fred (#) about Lunch on 1.1.11"
  instead of "Fred, Lunch")

- Typically grouped by projects and/or
  context

- Easy to maintain in a digital system
  (different view on a database)

- Requires somewhat more organizational
  efforts if implemented paper-based

Step 3 – Organize

...

It it actionable? → **no** → Trash / Archive / Someday

↓ yes

multiple actions → What is the next action?

Plan project

- takes less than 2 min → Do it
- right person? → Delegate it → Waiting-for
- else → Defer it → Calendar / Next actions

How to Plan a Project

- In GTD, a project is something that needs more than one action

- Small projects are defined straight-forward, but planning larger projects can be a challenge

- How to plan a larger project?

The Natural Planning Model

- A sequential, five-step process

  1. Define purpose and principles
  2. Outcome visioning
  3. Brainstorming
  4. Organizing
  5. Identifying the next actions

- Perform these steps **sequentially**, this typically improves the project plan

1. Define Purpose and Principles

- **WHY?**
- First, sketch the purpose. That is often easy but triggers the following steps
- It defines success, decision-making criteria, and clarifies the focus
- Principles are the boundaries of the plan
- Complete: "I would give other total free rein to do this as long as they…"
- It helps you to define your "standards"

2. Vision and Outcome

- **WHAT?**
- What do you imagine about the project?
- Sketch the picture you have in mind
- Imagine the status of the project from beyond the completion date
- Envision "wild success"

3. Brainstorming

- **HOW?**
- Capture the ideas on how to realize what you imagined before in step 2
- Brainstorming keys
    - Do not judge, evaluate, or criticize
    - Go for quantity not quality
    - Put analysis and organizational aspects to the background
- Write things done on a piece of paper
- Mind maps are helpful for some people

4. Organizing

- Once you "emptied your head" in step 3 it is time to organize, judge, and evaluate your ideas

- Identify components, subcomponents, deadlines, milestones, dependencies

- Recursively refine the individual pieces

- Tools: Gantt charts, Pert diagrams

- Most people that talk about project planning refer to this step (and often do ignore the others)

5. Next Actions

- After identifying the components in step 4, define the **next physical actions** that need to be taken

- Add them to your lists

Question: Is all that really needed?

- It depends on
  - the person and its experience and the
  - similarity to previously realized projects

- Recommendation: Do it for some time with this granularity and try it out!

Step 4 – Review

- **Reviewing** your projects, actions, lists on a regular basis is essential
- The goal of the review is to ensure that all projects/actions are up to date
- Update your lists
- Remove irrelevant/expired actions
- Review all your Waiting-for lists
- Are all actions in line with your goals
- Are there any uncollected items?
- Recommendation: a weekly review

Step 5 – Do

- **Do** the actions you specified before
- Models for choosing actions
    - Four-criteria model for choosing actions at a given moment
    - Threefold model for evaluating daily work
    - The six-level model for reviewing your own work
- These models do not tell you what to do but should support you to frame your options in a smarter way

Four-Criteria Model for Choosing Actions at Moment

- Apply the four simple criteria for choosing actions to do
    - Context
    - Time available
    - Energy available
    - Priority

Threefold Model for Evaluating Daily Work

- When working, one can do three different kinds of activities

  - Doing predefined work
    (the actions defined in steps 1-4)

  - Doing work as it shows up
    (ad-hoc events or surprises may require immediate actions)

  - Defining your work
    (doing GTD)

The Six-Level Model for Reviewing Your Own Work

- Goal: Support to define your priorities
- This models uses 6 levels/perspective
  - 50,000 ft: Life
  - 40,000 ft: Three- to five-year vision
  - 30,000 ft: One- to two-year goals
  - 20,000 ft: Areas of responsibility
  - 10,000 ft: Current projects
  - Runway: Current actions
- Defining your 6 levels helps to intuitively come up with priorities for your actions

GTD Overview

"stuff"

In-basket

What is it?

Is it actionable? — no → Trash / Archive / Someday

yes

Plan project ⇄ multiple actions ⇄ What is the next action?

takes less than 2 min → Do it

right person? → Delegate it → Waiting-for

else → Defer it → Calendar / Next actions → Do it
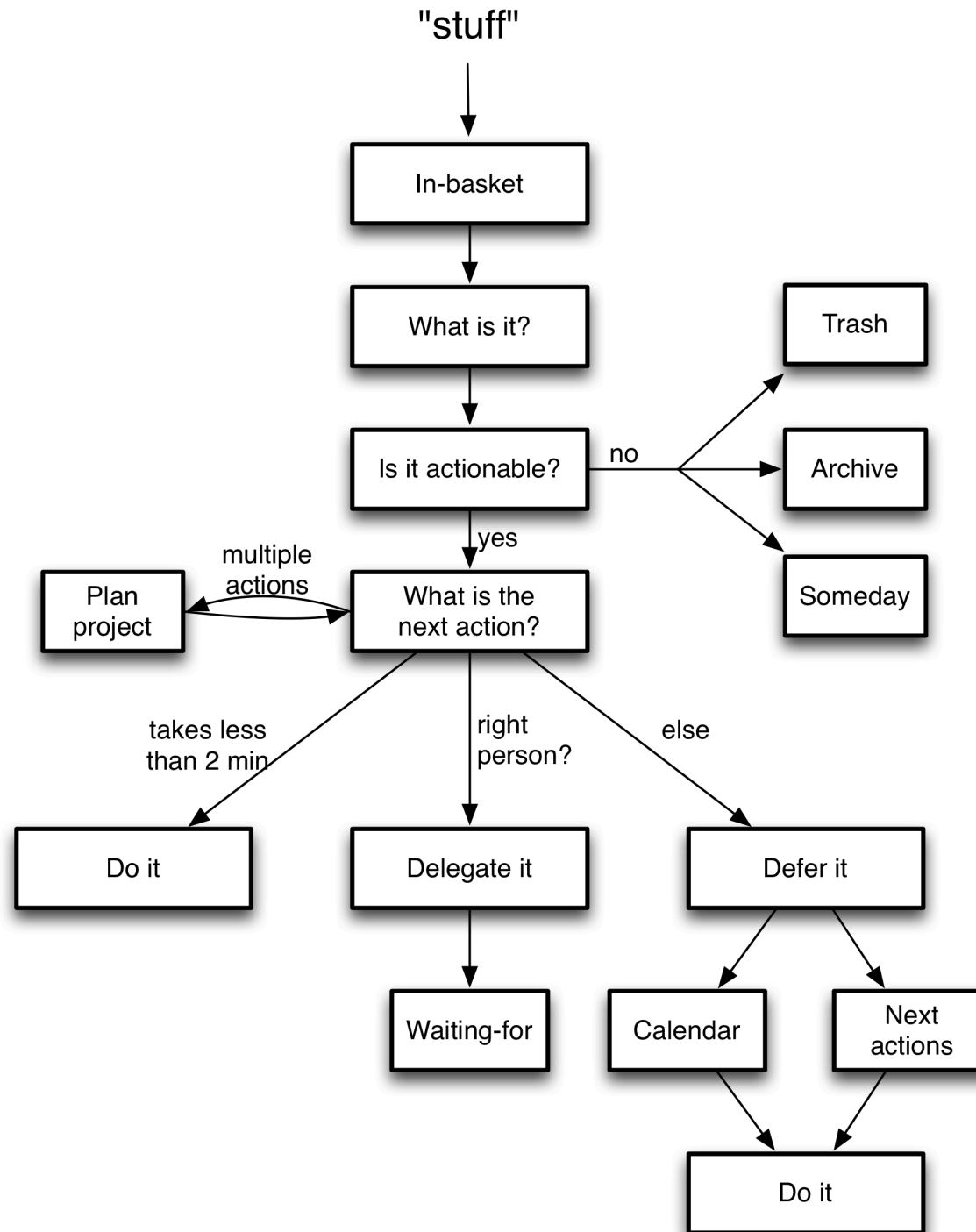
& regular reviews

Tools to Implement GTD

- I found it important to have good tools to implement GTD

- The GTD book is from 2002 and a lot has happened in terms of GTD software

- There are many people implementing it with a paper-based notebook…

- … probably not the preferred solution for geeks…

Important Features (for Me)

- Easy & quick to capture/collect stuff
- Import of & references to emails, copied text, and any files
- Allows to define context, start and due dates
- Predefined context-view
- Easy to re-organize actions and project
- Possibility to sync with my phone
- Sync between different computers

My Favorite Tool: OmniFocus

- OmniFocus from The OmniGroup
  http://www.omnigroup.com/products/omnifocus/

PROFESSIONAL-GRADE PERSONAL TASK MANAGEMENT

Also has its disadvantages:

- OSX/iPhone only, no web interface, not free (50-80)

OmniFocus Screenshot
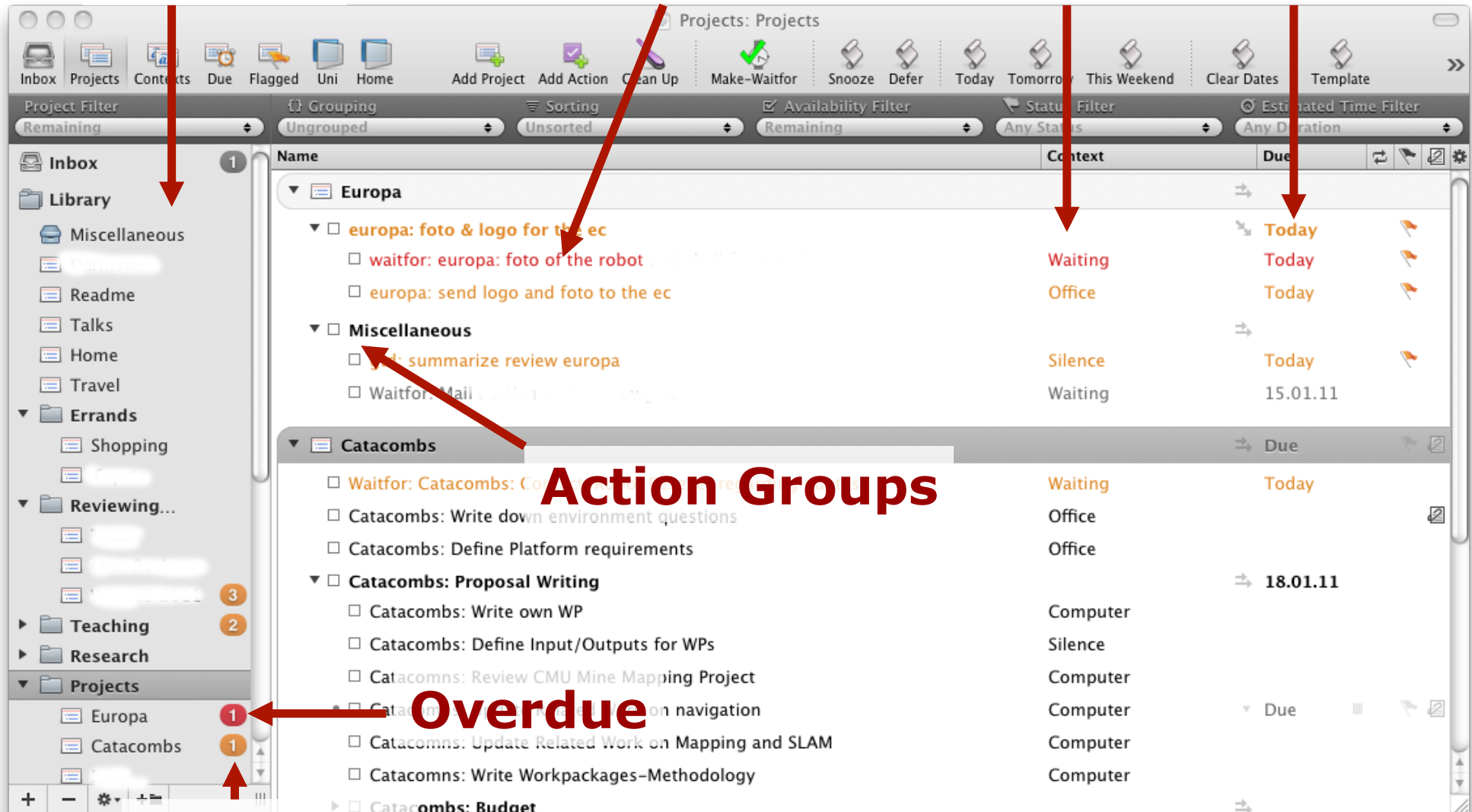
Projects　　　**Actions**　　　**Context**　　**Deadline**

Projects: Projects

| Inbox | Projects | Contexts | Due | Flagged | Uni | Home | Add Project | Add Action | Clean Up | Make–Waitfor | Snooze | Defer | Today | Tomorrow | This Weekend | Clear Dates | Template |

Project Filter	{} Grouping	≡ Sorting	☑ Availability Filter	☞ Status Filter	⏱ Estimated Time Filter
Remaining	Ungrouped	Unsorted	Remaining	Any Status	Any Duration

Name	Context	Due	⇄	⚑	▨	⚙
▼ 🔲 **Europa**			⇉			
▼ ☐ europa: foto & logo for the ec		Today	↘	⚑		
☐ waitfor: europa: foto of the robot	Waiting	Today		⚑		
☐ europa: send logo and foto to the ec	Office	Today		⚑		
▼ ☐ **Miscellaneous**			⇉			
☐ : summarize review europa	Silence	Today		⚑		
☐ Waitfor: Mail	Waiting	15.01.11				
▼ 🔲 **Catacombs**		⇉ Due		⚑	▨	
☐ Waitfor: Catacombs: Co	Waiting	Today				
☐ Catacombs: Write down environment questions	Office				▨	
☐ Catacombs: Define Platform requirements	Office					
▼ ☐ **Catacombs: Proposal Writing**		⇉ 18.01.11				
☐ Catacombs: Write own WP	Computer					
☐ Catacombs: Define Input/Outputs for WPs	Silence					
☐ Catacomns: Review CMU Mine Mapping Project	Computer					
☐ Cata on navigation	Computer	▾ Due			▨	
☐ Catacomns: Update Related Work on Mapping and SLAM	Computer					
☐ Catacomns: Write Workpackages–Methodology	Computer					
▶ ☐ Catacombs: Budget		⇉				

Sidebar:
- Inbox — 1
- Library
  - Miscellaneous
  - [ ]
  - Readme
  - Talks
  - Home
  - Travel
  - ▼ Errands
    - Shopping
    - [ ]
  - ▼ Reviewing...
    - [ ]
    - [ ]
    - [ ] — 3
  - ▶ Teaching — 2
  - ▶ Research
  - ▼ Projects
    - Europa — **1** (Overdue)
    - Catacombs — **1** (Due soon)
    - [ ]

Action Groups

Overdue

Due soon

Find Your Own Tools/Setup

- Everyone has different needs
- Start with a simple text editor, that works surprisingly well
- After some time, evaluate different tools to see if this improves your productivity and comfort

What are Typical Achievements When Applying GTD

- Less things that block yourself from being creative and productive
- Less procrastination
- Less things get lost
- More things get done in time
- Less stress
- More precisely planned projects
- Ability to quickly find archived documents

Why GTD may not Work

- You track only a part of your "stuff"

- You do not trust your system

- You are not doing a regular review

- You are not familiar with the software tools you use

- You "over-engineer" your system (too many folders, special cases, etc)

- Your system is too complex or too easy ("keep it as simple as possible and as complex as needed")

A few Remarks When Starting

- Setting everything up may take a few days – but its worth investing that time
- You need silence to initially write down everything which is on your mind
- It takes a while until your mind starts trusting your system
- Keep your archive easily accessible
- Select a predefined date for a weekly review (e.g., Fridays at noon)
- Read the GTD book

More About GTD

- Read David Allen's GTD book
- "GTD for Geeks" on 43folders
- Inbox Zero of Merlin Mann
- Good podcasts of David Allen and Merlin Mann

Some links

- http://43folders.com/
- http://inboxzero.com/
- http://www.davidco.com/
- http://workawesome.com/productivity/

GTD in Small Teams

- GTD itself is a one-man show, no means for team work

- In most settings, however, GTD can be applied very well if

  - Everyone applies GTD personally

  - You can rely on that if you send a task to someone, it is captured, processed, etc. appropriately

  - Everyone knows that you track the task assignments (e.g., waiting-for list)

GTD in Small Teams

- Nothing is allowed to be "lost"
- Creating minimal overheads

everyone does GTD

- Observation: there will be more progress on the "important" projects
- How to make a project important?
- Important projects have
    - One responsible person
    - A clearly defined goal
    - A deadline
    - (A budget) - probably does not apply here

Inbox Zero

- A GTD-like system to process your emails by Merlin Mann

- Relevant if you think that you spend too much time with your email

- Key ideas have been presented in a Google Tech Talk, see http://inboxzero.com/

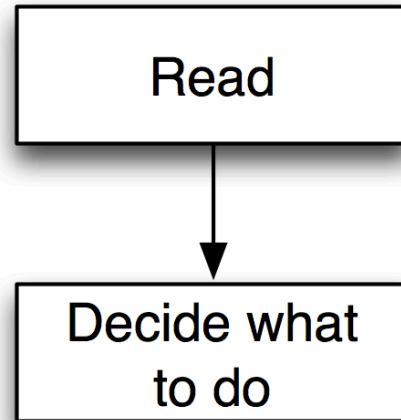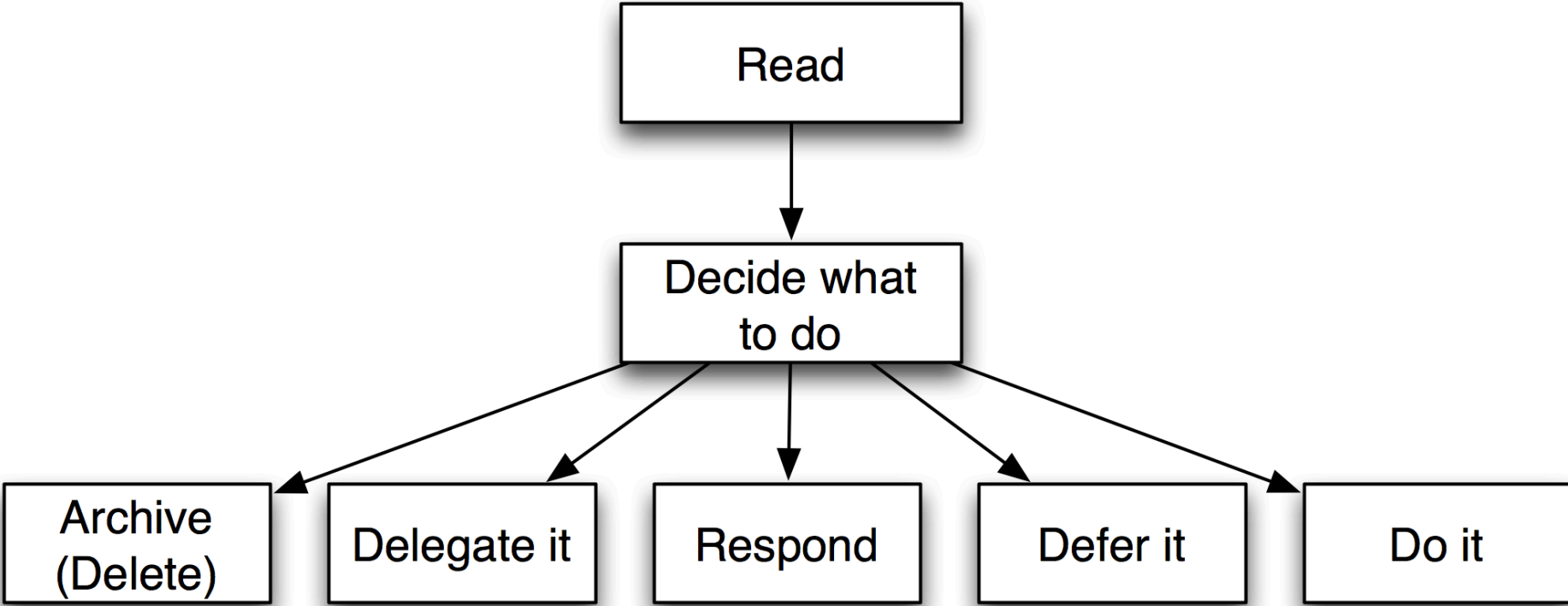# Inbox Zero Essentials

- **Never check** your emails, **process** your emails
- **Process** your inbox **to zero**
- **Convert** relevant emails **into actions**
- Do not use your inbox as a to-do list (no one would allow anyone to add useless stuff to the own to-do list)
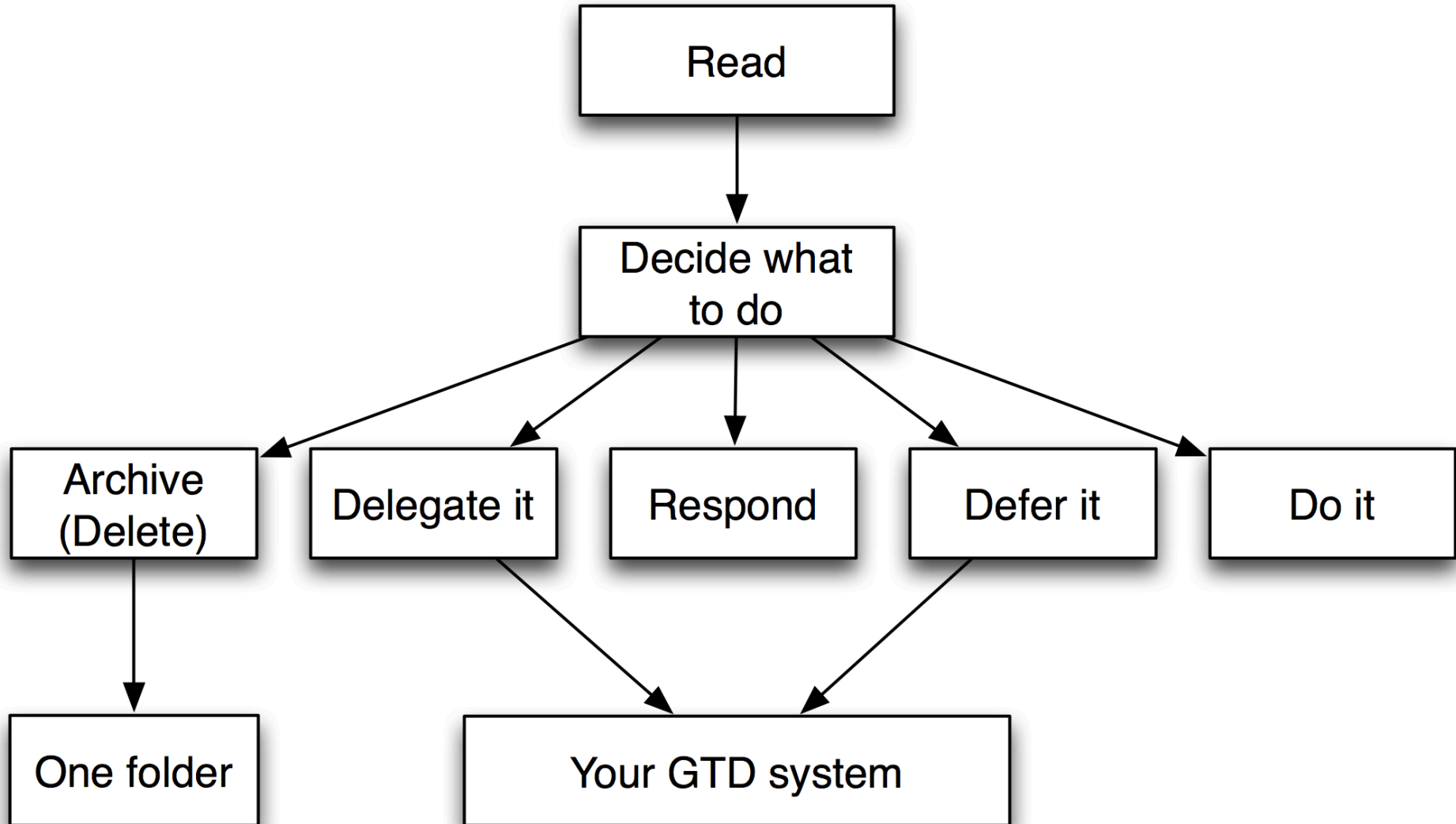- Open an email in your inbox **only once** and decide directly what to do about it

Process Your Emails

Process Your Emails

```
                    ┌─────────────┐
                    │    Read     │
                    └──────┬──────┘
                           │
                           ▼
                    ┌─────────────┐
                    │ Decide what │
                    │   to do     │
                    └──────┬──────┘
```

| Archive (Delete) | Delegate it | Respond | Defer it | Do it |

Process Your Emails

```
                        ┌──────────┐
                        │   Read   │
                        └────┬─────┘
                             │
                             ▼
                    ┌────────────────┐
                    │  Decide what   │
                    │    to do       │
                    └───────┬────────┘
```

Archive (Delete)	Delegate it	Respond	Defer it	Do it

| One folder | | Your GTD system | | |

Keeping Emails in Your Inbox

- requires you to repeatedly re-analyze what to do with an email

- promotes procrastination

- requires to keep the email client open all time which causes distractions
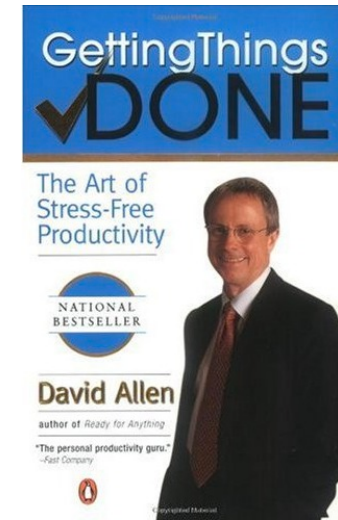
Reduce Distractions

- Creative and productive requires distraction-free blocks of time

- Email clients frequently check emails and will bother you with notifications

Inbox Zero Strategy:

- Process your email to zero

- Close your email client for at least 60 minutes (or longer)

- Work (do things!)

Summary

- This talk was intended to sketch GTD
- To implement it, read the book
- Good tools are important to really implement GTD
- Spent too much time on email: Watch the inbox-zero (Google)