

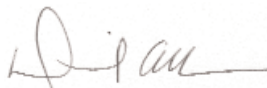
This is a brief description of the programs and products offered by the David Allen Company. All serve our corporate purpose of helping people get more done with less effort, improving performance and the quality of the work experience.

Our seminars provide an understanding of the best practices and tools of personal and interactive productivity, and our coaching programs install those behaviors and systems, tailored to individuals. Our expanding library of training and reference materials provides implementation support and on-going education.

A unique quality of our models is the universality of their applications. They can be equally relevant and beneficial to senior executives as they can be to new hires, across every division. They can also contribute as much to one's personal as well as professional life.

Our clients include international corporations, governments, not-for-profits, small enterprises, and private individuals. And though our offerings have great stand-alone value, hundreds of organizations have successfully used a combination of our seminars, coaching, and published materials to significantly improve output and the general tone of their work culture.

We invite you to explore further with us how we can support your goals and those of your organization. Please contact our office for more details, and perhaps to schedule a more in-depth conversation.



David Allen  
President

# 1

## Overview of resources Seminars

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### Getting Things Done: Mastering Workflow (7 hours)

Provides a step-by-step delineation of the five phases of workflow management and the objective thinking process required to most effectively deal with the action level of work. Shares the best practices for collecting, processing, organizing, reviewing, and deciding about what to do, in real time. How to configure specific organizing tools (E.g. Outlook), set up filing systems, and tie it all together into a logical seamless system. Lecture, participant exercises, and Q&A provide a good "running start." Workbook provided.

### Getting Things Done: Managing Project Focus (4 - 6 hours)

Includes modules on outcome focusing, brainstorming, and a practical and highly effective five-phase planning model. Best practices for quickly and effectively thinking through a project or situation, getting it directed, organized, and in motion. Workbook provided.

### Getting Things Done: Managing Workflow, Projects, and Priorities (12 hours)

Two-day format includes the complete Mastering Workflow and Managing Project Focus curricula, plus modules on project inventories and priority setting. This is the "flagship seminar" of the David Allen Company. Workbook provided.

### Getting Things Done: Introduction to Mastering Workflow (4 hours)

A "freeze-dried" version of the Mastering Workflow seminar. Delineates the basic processes of gathering, deciding about, and organizing work. Discussion of organizing tools and options for implementation at the workstation after the seminar. Lectures and brief exercises to test out the model. Minimal hands-on. Workbook provided.

### Seminar Follow-Up Telecoaching (1/2-hour call)

Optional follow-up calls with Getting Thing Done seminar participants to reinforce implementation of the principles and assist in customizing individual application. Can be included as part of the seminar delivery program.

### Getting Things Done: Leveraging Focus and Vision (7 hours)

This is a "graduate level" one day seminar that explores how vision, personally and organizationally, generates the two ingredients of permanent change: information and inspiration. This seminar is useful for individuals who want to clarify their own personal goals and horizons. It provides leaders and organizations with powerful formats for unifying and inspiring group outcomes and upleveled performance standards.

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### Overview of resources

## Individual workflow coaching & consulting

### Workflow Coaching (16 hours in 2 contiguous days)

Done at the client's office or workstation. Captures and eliminates backlog of unprocessed work items, trains in best practices for dispatching work at hand, and establishes a highly functional paper and digital organization system, specific for the client which can handle their day to day work load. Demands full attention and minimal interruption of the client's focus (this is not a time/motion study, but rather an intensive implementation of project and action management). Includes a preliminary briefing document, plus two follow up tele-coaching calls 1 to 2 weeks afterwards. This is the most effective implementation model for the David Allen Company workflow methodology.

### Workflow Coaching - Advanced (customized 1-day sessions)

This is a follow up coaching session as needed by the client. It can include fine-tuning his or her systems, refreshing the process, and actual day-in-the-life implementation monitoring.

### Workflow Telecoaching (1-hour calls)

Telecoaching provides hands-on support to help you set up, maintain, upgrade, and reconnect to your personal productivity best practices and tools.

### Seminar Follow-Up Telecoaching (1/2-hour call)

Optional follow-up calls with Getting Thing Done seminar participants to reinforce implementation of the principles and assist in customizing individual application. Can be included as part of the seminar delivery program.

### Workflow Assessment (2 to 8 hours)

This provides an overview to the client of the best practices of workflow management, an assessment of the client's current workflow and systems, and practice application in selected areas of work at hand, as time allows. It does not include cleaning up backlogs, creating a customized integrated system, nor fine-tuning and testing the system. This is not a shortened Workflow Coaching, but rather an overview and taste of the process and recommendations for improvement.

### Team applications

These workflow methods, when implemented, can have a significant impact on interactive productivity for teams and workgroups. A combination of seminar, coaching, and organization development consulting has proven highly successful. A preliminary conversation with a David Allen Company senior consultant to assess needs and explore approaches would be the initial step.

## Customized productivity programs

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### Organizational Alignment

The David Allen Company offers a unique five-phase Organization Alignment program, designed to integrate and streamline the energies of teams, divisions, and whole companies. The Communication component eliminates backlog and establishes an atmosphere of trusted interactions. The Direction process aligns the sights, sets the scale and scope, and establishes the rules of engagement. The Product phase clarifies the major organizational outputs and accountabilities, creating a highly functional org chart to blueprint structures for the next year. The fourth segment, Planning, ensures operational implementation. And finally, Statistics establishes monitoring functionality to keep the organization on course. The scope of the program is tailored to the specific situation and needs of the client, but invariably produces a dramatic turbo-charge to the forward motion of the enterprise.

### Strategic Team Planning

Strategic Team Planning is designed to assist management groups, departments, project teams, or communities to align and expand their abilities to handle issues and meet organizational objectives. The program facilitates teams through cornerstone decisions, effective planning, and team building. The end result is an environment of team members heartily committed to clear roles and accountable for their actions. Strategic Team Planning is delivered in three phases. The first phase (1) ensures a proper context for the program by assessing the group's make-up, maturity, and role in the larger scheme of things, and (2) customizes a preliminary questionnaire to surface critical issues and creative solutions and possibilities. The second phase is two days, usually off site, during which the team will arrive at its aim, conduct a situation analysis, develop high leverage strategies, determine objectives and develop action steps. The third phase is a customized series of follow-up sessions, usually comprised of quarterly meetings and monthly coaching calls, designed to assess accomplishments and improvement opportunities to support the successful implementation of the strategic plans.

### Productivity Assessment

At times it is useful to conduct a more-than-standard assessment of the productivity improvement opportunities within an organization. We conduct an exploratory analysis of productivity issues and make recommendations for an appropriately scaled program. This usually requires one day of on-site or telephone interviews.

### Meeting Facilitation

Often an "outside" consultant is the best way to manage meetings--keeping discussion focused and ensuring participation, effective topic development, and responsible closure. David provides such non-partisan facilitation to executives and managers who need groups to think and talk through issues and situations, leading to successful outcomes.

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## Overview of resources Presentations

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We offer a variety of dynamic presentations about the increasingly popular topic of relaxed productivity. Engaging speeches and workshops can be targeted to key "hot" issues for a wide range of professional populations, in every type and size of organization. In customized 90-minute to half-day formats, we present new and highly relevant perspectives on the topics of time, stress, and priority management, work/life balance, organization, and self management.

### **Topics include:**

The Executive Mandate - Coping with Lean and Mean

Ready for Anything - Principles of Productivity

The Five Keys to Mastering Workflow

Managing Commitments - the Key to Relaxed Control

Creating Order Out of Chaos - Staying Afloat in a World of Too Much to Do

Getting Things Done: the Art of Stress-Free Productivity

Getting Projects Off Your Mind and Moving - Why Natural Planning is Not Normal

Mastering the Art of Work

What's On Your Mind? How to Stop Unproductive Thinking and Get Things Done

Making Change Stick - the Two Magic Ingredients

Getting Things Off Your Mind and Getting Them Done - The Zen of In-Basket Maintenance

Leveraging Focus and Vision - Harnessing the Power of Imagery in Life and Work

### Books by David Allen:

#### Getting Things Done: The Art of Stress-Free Productivity

This business best-seller is a complete guide to the workflow and project focus methodology in our coaching and seminars. Available in hardback and paperback.

There is also an abridged audio version of the Getting Things Done book, running time approximately 3 hours, available on CD, read by the author.

#### Ready for Anything: 52 Principles for Work and Life

An edited compilation of key principles and powerful essays David has been writing and formulating over the past decade, Ready for Anything provides both an easy introduction to and an elegant expansion of the fundamental methodology for getting things done and staying sane in the process. In easily digestible bites or taken as a whole, it's a practical and inspiring read for those interested in the marriage of high performance and sustainable quality of life. Available in hardback and paperback.

There is also an abridged and an unabridged audio version of the Ready for Anything book available on CD.

### Other:

#### Getting Things Done Templates

Set of five two-sided laminated pages with key learning points supporting the application of the principles of the seminars and coaching. Includes Mastering Workflow, the Incompletion Trigger List, the Workflow Processing & Organizing Diagram, the Weekly Review, the Natural Planning Model, the Project Planning Trigger List and the Horizons of Focus.

#### GTD for Outlook® (a white paper)

A best-practices manual for configuring and using Microsoft® Outlook to support the Getting Things Done methods. Clear instructions and lots of power tips. A 37-page step-by-step manual for optimizing Outlook as a personal productivity tool. Instructions for how to set up views and utilize the hidden power of Tasks and Notes, as well as great tips and tricks for productive use of the Calendar, InBasket, and Contact functions. Compilation of best practices from thousands of hours of our workflow coaching with high-level professionals in Outlook environments.

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## Overview of resources

# Products

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### Software:

#### Getting Things Done Outlook Add-In (software)

The add-in to Microsoft Outlook allows you to implement the Getting Things Done workflow seamlessly with your electronic inbox to manage your email and provide a trusted system for you. Includes buttons to Delegate, Defer, File for reference, Incubate/Someday, and many other features, along with the ability to designate the next action and project associated with the item. Switch between handy views to suit how you work. Ideal for entering your next action to do's, glance across projects, and stay organized within the familiar Outlook environment. Includes the content from the "Implementing David Allen's Workflow Processing Using Microsoft Outlook" document.

### Getting Things Done public seminars

Our flagship seminar, "GTD I The RoadMap", "Getting Things Done: Managing Workflow, Projects and Priorities," and our one day "Getting Things Done: Leveraging Focus and Vision," are presented to the public periodically in major cities. Corporate discounts are available. Check our schedule on our web site [davidco.com](http://davidco.com) on the Public Seminars page.

### Website - The David Allen Company - <http://www.davidco.com>

With lots of free articles, tips, and information, the site introduces and reinforces many of the concepts and methods provided in the seminars and coaching.

### E-mail Newsletter - "David Allen's Productivity Principles"

Our free monthly newsletter contains a key productivity principle with commentary, David's current monthly Food for Thought essay, quotes, and practical tips. Sign up on the David Allen Company Web site at [davidco.com](http://davidco.com). Or send your request and email address to [info@davidco.com](mailto:info@davidco.com).

For more information contact us at:

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