

GTD 

AND

Entourage

Getting Things Done.



DavidAllen

A smarter way to work & live™

© David Allen & Co. 2006 All rights reserved.

No part of this document may be reproduced, copied or distributed without express permission from The David Allen Company.

The setup instructions in this document work with Microsoft® Entourage® 2004 for Mac®. If you have a different version of Entourage there will be some slight differences in the location of dialog boxes, functionality of speed keys etc.

1 Introduction

The principles that optimize the management of work.....	2
The need for simple lists.....	3
"Portabilizing" your lists.....	3
Get very friendly with your keyboard.....	4

2 Using Entourage Tasks

New definitions of "Category" and "Task".....	7
Reconfigure your Task interface.....	7
The final structure.....	8
Customize your Master Categories list.....	8
The best categories to start with.....	10
Customizing your categories.....	15
Use the Task speed keys.....	15
Using the Find feature in Tasks.....	16

3 Using the Calendar

Time-specific actions.....	17
Day-specific actions.....	17
Day-specific information.....	19
The speed keys for inserting calendar items.....	20
Putting the Calendar and Tasks together functionally.....	20

4 Organizing Email

The fundamental success factor: operate from zero base.....	21
How to get email to empty.....	21
Quickly make a task from an email message.....	23
Speeding up email addressing.....	24

5 Other Useful Lists

How it works as a list manager.....	25
Setup.....	26
Some great categories and lists.....	26
Quickly make a Note from an email message.....	27
Cutting and pasting.....	27

6 Tips about Contacts

Get control of your new inputs.....	28
Creative use of the Find feature.....	29

7 Miscellaneous

Blackberry devices.....	30
Palm devices.....	30
Creating custom shortcuts for Entourage.....	30

8 Conclusion

Many people in our client organizations have expressed interest in optimizing Microsoft Entourage as their personal organizing system utilizing the David Allen Company workflow management best practices. This is a manual for setting up Entourage and using it effectively in that context.

This information will provide the greatest value if you have some familiarity with our workflow mastery model. Many of the suggestions herein will be intuitive and common sense to anyone, but maximum power in using Entourage lies in the understanding and implementation of our total approach. The complete delineation of these high-performance methods of personal productivity can be found in David Allen's book, Getting Things Done - The Art of Stress-Free Productivity.¹

The following recommendations come from thousands of hours of one-on-one coaching with professionals at all levels. This manual provides a tested basic set of formats and behaviors that have proven to work as a starting point for many people. We suggest you try it out and then tweak the system to fit your own needs and preferences. Much room remains for experimentation and customization, and no two clients of ours wind up with exactly the same configurations and procedures in place.

The setup instructions work with Entourage 2004 for the Mac. If you have a different version there will be some slight differences in the location of dialog boxes, functionality of speed keys etc.

The principles that optimize the management of work

In order to understand our specific recommendations for Entourage setup and usage and to maximize its potential in practice, it's important to clarify some simple but powerful productivity behaviors. These are fundamental to the success of the system and Entourage cannot do them for you! They are basic disciplines in managing work flow that must become part of your ongoing work habits, in order to generate the appropriate contents for your lists. If you don't engage in these behaviors, don't fault the organizing software! The lists will be incomplete and not give you enough payoff of relaxed control to keep you motivated to maintain them.

1. Don't leave anything in your head or in unprocessed stacks

If your system contains only partial information, it won't give you the payoff of a system, and you won't be motivated to maintain it. (e.g. if your "Calls" list doesn't have every single call you need to make, your head will still have to keep remembering and reminding about the rest of them, and trying to keep only some of them in Entourage will be too much work for the minimal benefit you'll gain.)

2. Decide the next physical action

If you don't determine the very next action needed on a Task or project or an email, you won't know where to park the reminder, and the decision-still-needed pressure will cause you to avoid engaging with your lists. (e.g. "Set meeting with the team" needs to be further delineated as "Call Ana Maria to set meeting" on

¹Getting Things Done: the Art of Stress-Free Productivity; Viking, New York; 2001, hardback. Available from booksellers or at www.gettingthingsdone.com

your Calls list, or “Email team for best meeting dates” on your At Computer list, or “Talk to Jessie re: team meeting” on your Agendas for Assistant list.)

3. Review and update the contents of the whole system regularly

A system is only as trustworthy and beneficial as it is current, consistent, and complete. The more the system can be kept up to date as you go along, the more “alive” and supportive it will be to allow your mind to focus on the work at hand. The world will probably come at you faster than you can keep it totally processed and organized, but you can’t let it slip too long before you catch up. The reminders of projects and actionable items must be cleaned up and refreshed at least every seven days.²

The need for simple lists

Once you have appropriately processed your “stuff,” simple lists will store most of your reminders and reference information. These can be “flat” lists—not tied or related to other things, nor sorted by priority or urgency—just lists. You need a list of projects, a list of all the calls you need to make, a list of all the things you are waiting for to come back from other people, etc. You may also want lists of your key objectives for the year, your favorite movies to rent, and all the things you might want to pack whenever you take a trip. The Entourage Tasks section can be a terrific list manager for your actionable items and the Entourage Notes area can serve as a very functional catalog of checklists and reference material.

“Portabilizing” your lists

Another key success factor to using Entourage for personal management is having an easy way to publish the lists into some portable format (and the behavior of actually doing that when needed). Any personal organizer will function at a much higher level when it contains everything that might be needed for a reminder anywhere (vs. some at the office, some at home, some in your briefcase, some in your head, etc.) It will need to contain a list of errands you need to run when you’re out and about, things to talk with your spouse about when you’re with them, and things to do at home when you have some time in that environment. And if you subliminally know that your lists may not be with you when you might use them (such as your Calls list available whenever you have free time and a phone), you won’t be motivated to keep them populated and current.

There are two ways to make this work:

1. Synchronize to a PDA

You can set up Entourage to synchronize with a Palm®, Pocket PC® or BlackBerry® handheld device. In our experience coaching many Entourage users, the easiest tool for distributing your Entourage lists is the Palm. It is just the kind of basic list manager required. When you configure Entourage Tasks as we suggest, you will create lists as Categories, and these will map one-to-one to the To Do lists on the Palm. Similarly, your lists in Entourage Notes will map to the Memo function on the Palm.

²See our Web site (www.davidco.com) for *The Weekly Review* (a free download in our online store.)

Any PDA can work, as long as you work it. For the more complex PDA's, the list-management habits have to be more rigorously applied. Whatever system you use very soon has to be on "automatic," i.e., you're just using it, not thinking about how to use it, and not trusting your head more than the tool.

2. Print your lists into hard copy

Instead of using a PDA, some people choose to print out appropriate action-reminder lists into hard copy, including their calendar, to carry with them when they leave their computer. They then hand-edit those lists as they move around, in meetings, at home, or traveling, updating Entourage when they are back at their workstations. This can work fine, and in some cases with some people, because of the additional visibility and note-adding capability of paper lists, better than a digital version.

Get very friendly with your keyboard

The ease of making entries ad hoc, as things occur to you, will make or break the usage of Entourage for action management. The system should work almost as quickly as you think, or it won't hold up to keep you current. Subliminal resistance to your data entry process usually creates a barrier for using any digital tool as a total system. The faster you are at the keyboard, the more you will be able to use Entourage as a highly leveraged personal productivity device. It is not just an arithmetic curve—it is at least geometric. As your capture/ process/think tool and behaviors come closer to matching the speed with which your mind can shift its focus and generate new ideas, they will foster and facilitate that thinking at an increasing rate and quality. When the techniques in this manual are just being used and no longer thought about consciously, you will have entered a very different world of personal productivity. It's hard to imagine the power of it until you've tasted it.

Using the speed key combinations (instead of the mouse) for the small number of regular commands for creating and storing new entries will make the process at least four times faster. Learn and use both the standard Macintosh and the Entourage-specific key combinations.

If you aren't using them already, make the standard universal Macintosh speed key combinations habitual. The ability to cut and paste portions of emails, telephone numbers, and documents as attached notes to items on your lists will provide tremendous usefulness to your system. And switching between open applications to follow through on your workflow thoughts as you have them makes you more productive.

Standard Macintosh speed-key combinations

- ⌘ **+a** - Select the whole document
- ⌘ **+c** - Copy whatever is selected to the clipboard
- ⌘ **+x** - Cut whatever is selected to the clipboard
- ⌘ **+v** - Paste what's in the clipboard to the cursor location
- ⌘ **+p** - Print
- ⌘ **+z** - Undo
- ⌘ **+w** - Closes the current window
- ⌘ **+q** - Closes the current application
- ⌘ **+tab** - Switch between open Macintosh applications

Entourage-specific speed keys

Some of the Entourage speed-key combinations we suggest in this document may not fit exactly with your version and toolbar views. Experiment to find which ones match your setup. Using some combinations for navigating within Entourage will increase your productivity:

- ⌘ **+1** - go to email
- ⌘ **+2** - go to the address book
- ⌘ **+3** - go to the calendar
- ⌘ **+4** - go to the notes list
- ⌘ **+5** - go to the task list
- ⌘ **+<delete>** - delete the current item selected for the given view (message, event, task, or note)
- ⌘ **+<option>+n** - create a new email message from any view
- ⌘ **+`** - switch between open Entourage windows

By creating open windows for Email, Tasks, and Calendar you can ⌘ **+`** between these open windows instantly as your thinking moves between them:

- ⌘ **+<option>+1** - opens the current email view in a new window
- ⌘ **+<option>+2** - opens the address book list in a new window
- ⌘ **+<option>+3** - opens the calendar in a new window
- ⌘ **+<option>+4** - opens the notes list in a new window
- ⌘ **+<option>+5** - opens the task list in a new window

Also, by adding custom shortcuts to Entourage using AppleScript, you can use additional short cuts within Entourage to speed your processing. See section 7 of this whitepaper for more information.