

GTD 

AND

Lotus Notes®



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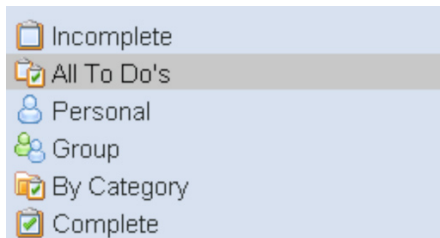
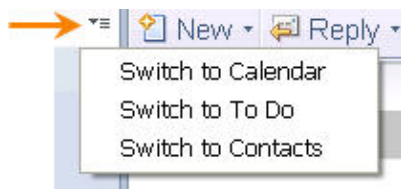
New Definitions of “Category” and “To Do”

Your Lotus Notes To Do application allows sorting of your entries by category. This is very GTD friendly, as we will use categories as a way to create a comprehensive set of project and context-related action management lists. The categories in Lotus Notes To Do's will represent the various contexts that define where you need to be, what tools are required, or what other person they relate to (such as “Calls”, “Computer”, “Home”, etc.), and a “New Task” will be used to enter anything that goes on any of those lists. Assigning a category to a task will organize it in your lists. The end result is a powerful action list manager, with all of your work organized and tracked in a logical, intuitive, and trusted GTD system.

Clean Up the Lotus Notes To Do Section

You will not want to build a new configuration with old “stuff” still populating your lists.

1. In the top left corner of your Lotus Notes Inbox, switch to **To Do** by clicking on the **drop-down menu to the right of your name**.
2. Select **All To Do's** view.



3. Strategies for cleaning up old items:
 - a. Go through each To Do one-by-one and either select delete or mark complete. Note that marking complete will leave these items in the All To Do's view, but will add a check mark letting you know it's complete. We'll work more with the best working views later in this section.
 - b. Print out your current To Do's view in hard copy and toss it into your hard copy Inbox to reprocess later into your new system. Then, select all entries **<Ctrl a>** and **Delete**.

The Fundamental Success Factor: Operate From Zero Base

The master key for managing email is the hardest habit for many to change—working from a regularly empty Inbox. It takes less psychic effort to operate from a zero base than to leave anything sitting in the Inbox. That doesn't mean that the Inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the Weekly Review). The problem is that most people do not have a system for managing their emails beyond the Inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in "In" as the safest place.

In order to evaluate the actions embedded in your email against all the other actions you need to take, you must be able to see reminders of those actions quickly and completely, along with all the rest. This is tough enough for the most organized, but almost impossible to do with more than a screen full of emails lying amorously undefined in "In". Here are some strategies for managing your Inbox and getting it to zero on a regular basis.

How to Get Email to Zero

The good news is that with the GTD methodology, you process email in the same way you do any other item in an Inbox. You need to delete a bunch, file some of them, do the quick ones, or create a trusted system for deferring the ones that require longer-than-two-minute action and those that represent something you are waiting on that you delegated to others.

If you've got any backlog of old, outdated emails sitting in the Inbox, we often suggest you clear that out first. Easier to stay on top of new email when your attention is not being bombarded with outdated emails from the past.



Delete Don't be afraid to delete emails you no longer need. Your IT staff will love you for it, and it will shrink your Inbox a ton. If you have more than a few hundred backlog emails to deal with, try sorting by Date, From, or Subject. You can often then delete, file, or archive a bunch at one time. Obviously, keep in mind any data retention policies before deleting emails! Your IT staff would know current policies around that.



Do The two-minute rule in GTD is magic. With few exceptions, any email that can be responded to in less than two minutes should be handled the first time you see it. You should obviously delete whatever you can; but if you're going to respond to it at all, and it takes less than two minutes, it'll take you longer than that to store it, open it up, and read it again, than it will be to handle it on the front end.



File Reading and filing an email can often be done in less than two minutes. Get comfortable with making reference folders in email for anything that would be useful to hold on to. Although relying on the search function can work, often having a folder titled very specific to the topic will make them all faster and easier to retrieve later.



Delegate If someone else needs to take the action about an email, hand it off to them. Ideally, that should be done right away, unless it is going to take significantly longer than two minutes to hand it off. We recommend also that (if you need to have your attention on the result from the handoff) you track it in a Waiting For folder or Waiting For list.