

GTD 

AND

Outlook 2010



DavidAllen
A smarter way to work & live®

License Agreement

David Allen Company, Inc. owns the intellectual property rights, including but not limited to all copyright and trademark rights, in this “Setup Guide for the Getting Things Done Methodology”, referred to as “Setup Guide”. The Setup Guide is and remains the property of David Allen Company. David Allen Company grants you, as an individual purchaser, a license to use this copy of the Setup Guide. You nor any other party are granted any ownership rights, copyrights, trademark rights, or any other rights whatsoever in or to the Setup Guide. As examples, neither you nor any other party may: (a) reproduce, in any form or by any means, the Setup Guide; (b) prepare derivative works of the Setup Guide; (c) distribute copies of the Setup Guide for sale or to persons who have not purchased the Setup Guide; (d) perform or display the Setup Guide publicly; or (e) authorize others to do any of the forgoing.

What is a copyright?

Copyright is a form of protection provided to authors of original works by the laws of the United States and international treaties to which the United States is a party. The copyright laws of the United States give the owner to the copyrights to a work the exclusive rights to:

1. Reproduce the copyrighted work in copies however produced (e.g., photocopying, scanning, faxing, electronically);
2. Prepare derivative works (e.g., translations, revisions, abridgements, dramatizations, video adaptation, any form in which the work may be transformed or adapted);
3. Distribute copies for sale;
4. Perform or display the work publicly; and
5. Authorize others to do any of the above.

What is the copyright policy of the David Allen Company?

It is the policy of the David Allen Company to reserve all copyrights to itself and to vigorously pursue any unauthorized use of its work.

What is a mark?

A mark is any word, name, phrase, design, symbol, or device or any combination of the same, used to identify goods (trademarks) or services (service mark) from a single source.

What is the policy of the David Allen Company with respect to its marks?

It is the policy of the David Allen Company to restrict to itself, and those persons licensed by it, all use of its marks and to vigorously pursue any unauthorized use of its marks.

Which are the marks of the David Allen Company?

Getting Things Done®, GTD®, GTD Connect®, Natural Planning Model®, GTD Weekly Review®, and Horizons of Focus® are marks owned by the David Allen Company. As the purchaser of the Program Materials, GTD System Guides, and the GTD Workflow Map, you are entitled to a single-user license.

If you wish to have additional copies of any of the Program Materials, add to your license, or obtain further information about the David Allen Company’s (DAC) other license opportunities, please contact DAC’s Legal Department at +1.805.646.8432 for details.

If you have any questions regarding copyrights or marks of the David Allen Company or if you are interested in obtaining a license to use the marks or words of the David Allen Company, please contact DAC’s Legal Department at +1.805.646.8432 for details.

Outlook® is a registered trademark of Microsoft Corporation.

BlackBerry® is a registered trademark of Research In Motion Limited.

iPhone® is a registered trademark of Apple, Inc.

1	Introduction	
	Getting the most out of Outlook®	2
	The best practices of Getting Things Done®	3
	The need for simple lists	3
	Making your lists portable	4
	Speed up your processing	4
2	Using Outlook Tasks	
	New definitions of “Category” and “Task”	8
	Instructions for customizing your Task view	9
	Customize your categories to work as lists	15
	The best categories to start with	16
	Linking projects to actions	24
	Marking entries private	25
	Using due dates	25
	How to create a new entry in Tasks	26
	How to create a Task using shortcut keys	26
	Working with completed Tasks	26
3	Using the Calendar	
	Time-specific actions	27
	Day-specific actions	27
	Day-specific information	28
	How to create a Calendar entry using shortcut keys	29
	Reviewing your action choices	31
4	Managing Email	
	How to get email to zero	32
	Tip for tracking Waiting For items	33
	Two methods for organizing actionable emails	35
	Using Quick Steps	37
	Delegating through Outlook	38
	Option for categorizing emails	38
5	Other Useful Lists	
	How it works as a list manager	39
	Some great categories and lists	41
	Capturing information on the go	42
6	Tips about Contacts	
	Get good at creating new entries	43
	Creative use of search	43
7	Conclusion	44
8	Speed Key Tips Sheet	45

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 amorphaously 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, 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 people clear out that first. Easier to stay on top of new email when your attention is not being bombarded with outdated emails from the past.

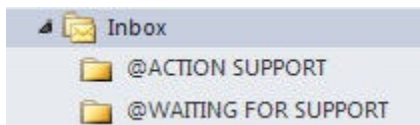
1. Delete Don't be afraid to delete emails you no longer need. (<Ctrl> **d** works fast, too.) Your IT staff will love you for it, and it will shrink your Inbox a ton. If you have more than a few hundred backlog emails to deal with, try sorting by Date, From or Subject. You can often then delete, file 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.

2. 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 Often reading and filing an email can 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 be faster and easier to retrieve later. The shortcut <Ctrl+Shift> **e** makes a new folder fast.

3. 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 have attention about the result from the handoff) you track it, and an easy way to do that is to cc: or bcc: yourself when you send a delegating email. That will give you a copy immediately back into your own Inbox, which you can then store in a Waiting For folder and track as @Waiting For in your Tasks.

Create the @Action Support and @Waiting For Support folders email now. You can store them on the server or in your personal folders, whatever will work best for your Outlook setup and company guidelines around creating folders. Similar to the Action lists in Tasks, the @ symbol will force these two key folders to the top of your folders list. We will explain the use of these folders in more detail on the following pages.



A visual cue to remind you that there are emails stored in these two critical folders is to right-click on each of the folders and change the Properties for them both from “Show number of unread items” to “Show total number of items”.

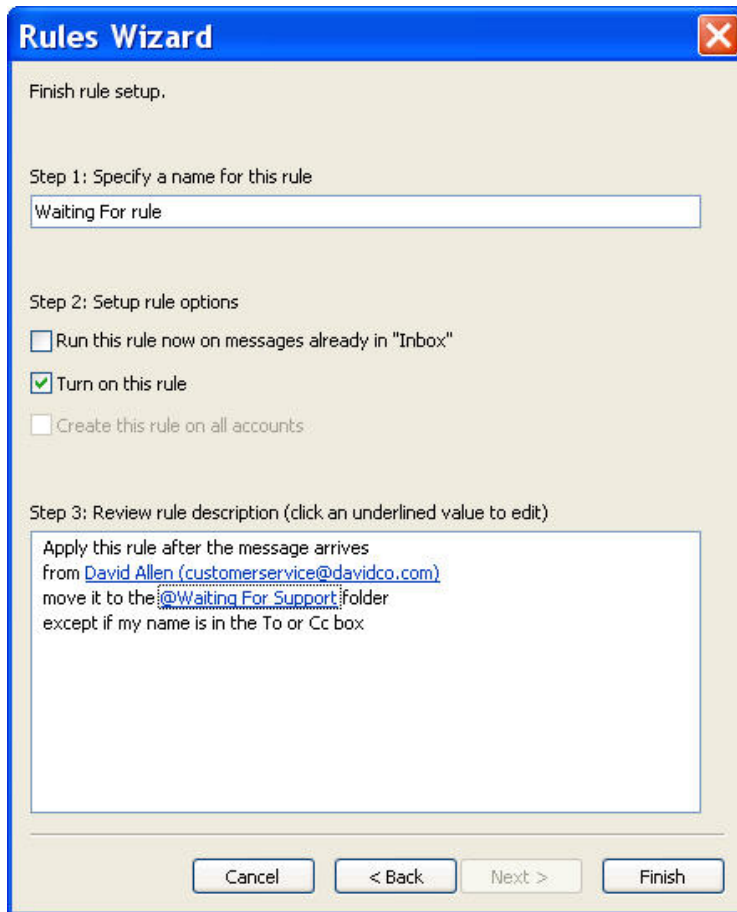
Tip for tracking Waiting For items

Create a rule in Outlook to copy delegated items to an @Waiting For Support folder.

1. Select **Rules** button from the ribbon
2. Click **Manage Rules & Alerts**
3. Click on **New Rule**
4. Select **Apply rule on messages I receive**
5. Click **Next**
6. Check off **from people or public group**. Then click on where **people or public group** is underlined and select yourself as the From contact (if you are not listed as a contact in your address book, you will need to create that first with the exact email address used by Outlook when you send email for this to work). Click **OK**. Click **Next**.
7. Check off **move it to the specified folder**. Then click on where **specified** folder is underlined and choose the Waiting For Support folder. Click **OK**. Click **Next**.
8. Check off **except if my name is in the To or CC box**
9. **Name your rule**



Your final settings should look like this:



10. Click **Finish**

Try it out by sending a test message to an address other than the one you specified in the rule (such as another email account you use or a co-worker) and put yourself in the bcc: field. It should send a copy of the email to your Waiting For Support folder.

What this rule does is eliminate the step of having to dig through your Sent folder to find emails for which you are waiting on a response. Be sure also to track the Waiting For item on your Waiting For list in Tasks, unless you have the discipline to review this Waiting For Support email folder with the same rigor you would your Action lists.

4. Defer If you cannot Delete, Do or Delegate the email, your final choice becomes to Defer it to do later. Where do you want to track that action? Do you want to have the email be the reminder or your Action lists in Tasks be the primary reminder? Either method can work very efficiently and elegantly. It will come down to your personal preference and discipline to work it consistently.

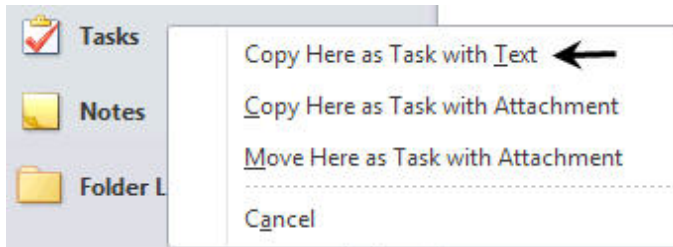
Two methods for organizing actionable emails:

1. Use your Action lists in Tasks as the primary reminder (our most common recommendation)

With this method, you have several choices of what to do with the email:

Option One: Drag and drop just the text of the email into a new Task and store the email in a folder.

Hold down your **right**-mouse button on the email and drag it down to the Tasks bar. Let go of your mouse when the Tasks bar is highlighted. Select Copy Here as Task with Text. Change the subject line to capture your next action, Categorize it, Save and Close. Then move the email in the appropriate email folder if you need that email again. Sending the email over as text only like this strips out all email formatting and related attachments. If there is no project, @Action Support or @Waiting For Support will work well for these kinds of random emails that don't warrant their own folder, otherwise, park it in a topic or project folder.

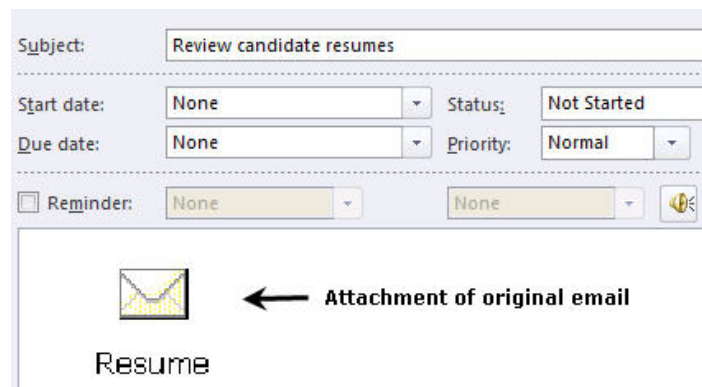


Option Two: Manually create a new Task and store the email in a folder.

Move the email to the appropriate email folder. Open a new task (go to Tasks or use (<Ctrl+Shift> k) and capture your next action. Some people will make a note somewhere within the Task entry letting them know where the email is stored.

Option Three: Move the entire email over to a new Task as a file attachment.

You can also send the entire email out of email and over to Tasks, preserving all headers, file attachments and formatting. Hold down your right-mouse button on the email and drag it down to the Tasks bar. Let go of your mouse when the Tasks bar is highlighted. Select **Move Here as Task with Attachment**. Change the subject line to capture your next action, Categorize it, Save and Close.



To add an email to an existing entry, open the Calendar or Task item and click on the **Insert** menu. You will see buttons for attaching copies of items (emails).

We hope this instruction guide has been useful. It is intended as an adjunct to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD® best practices presented in our many learning tools, including the *Getting Things Done* book, our public and on-site seminars, individual coaching, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and services available to assist you in getting your GTD system up and running. If you are a BlackBerry user, you will find value in our GTD & BlackBerry Setup Guide.

For more information, please visit:

www.davidco.com

www.gtdconnect.com

Or contact us:

David Allen Company

407-F Bryant Circle

Ojai, CA 93023

805-646-8432

customerservice@davidco.com