

GTD<sup>®</sup>

AND

Outlook<sup>®</sup> 2003



DavidAllen  
A smarter way to work & live<sup>®</sup>

## 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 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

<b>1</b>	<b>Introduction</b>	
	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
<b>2</b>	<b>Using Outlook Tasks</b>	
	New definitions of "Category" and "Task" .....	8
	Instructions for customizing your Task view .....	8
	Customize your categories to work as lists .....	15
	The best categories to start with .....	16
	Linking projects to actions .....	22
	Marking entries private .....	24
	Using due dates .....	24
	Working with completed Tasks .....	24
	How to create a Task using the shortcut keys .....	25
<b>3</b>	<b>Using the Calendar</b>	
	Time-specific actions .....	26
	Day-specific actions .....	26
	Day-specific information .....	27
	How to create a Calendar entry using shortcut keys .....	28
	Reviewing your action choices .....	31
<b>4</b>	<b>Managing Email</b>	
	How to get email to zero .....	32
	Organizing actionable emails .....	34
	Delegating through Outlook .....	36
<b>5</b>	<b>Other Useful Lists</b>	
	How it works as a list manager .....	37
	Some great categories and lists .....	39
	Capturing information on the go .....	40
<b>6</b>	<b>Tips about Contacts</b>	
	Get good at creating new entries .....	41
	Creative use of search .....	41
<b>7</b>	<b>Conclusion</b>	
	Additional resources .....	42
<b>8</b>	<b>Speed Key Tips Sheet</b>	43

GTD, the popular shorthand for Getting Things Done®, is the ground breaking work-life management system and book<sup>1</sup> by David Allen that transforms personal overwhelm and overload into an integrated system of stress-free productivity.

Sophisticated without being confining, the subtle effectiveness of GTD lies in its radically common sense notion that with a complete and current inventory of all your commitments, organized and reviewed in a systematic way, you can focus clearly, view your world from optimal angles and make trusted choices about what to do (and not do) at any moment. GTD embodies an easy, step-by-step and highly efficient method for achieving this relaxed, productive state. It includes:

- **Capturing** anything and everything that has your attention
- **Defining** actionable things discretely into outcomes and concrete next steps
- **Organizing** reminders and information in the most streamlined way, in appropriate categories, based on how and when you need to access them
- Keeping current and “on your game” by regularly **reviewing** the six horizons of your commitments (purpose, vision, goals, areas of focus, projects, and actions)
- Instilling the trust that what you are **doing** is best thing for you to be doing in any given moment

## Getting the most out of Outlook

For many of our clients, Microsoft Outlook is a logical choice for organizing their project and action reminders, especially if they already use Outlook for email and calendaring. This guide will walk you through applying the best practices of GTD to Outlook 2003. Consider these suggestions a starting point, that can be customized to fit your own needs and use of Outlook.

Outlook has features built-in to enable the structuring of a very powerful personal workflow system. The trick is to know which features to ignore and which to use, and how to customize that usage to fit with the best practices of Getting Things Done.

The Outlook Task function can be customized to be a simple but powerful list manager. The Outlook Notes section can be turbo-charged with some very useful reference material and checklists. Also, there are some simple things to do to manage email and the calendar that enhance their functionality and tie the whole inventory of your work together into a seamless and integrated dashboard for your workflow.

---

<sup>1</sup> *Getting Things Done: the Art of Stress-Free Productivity*; Viking, New York; 2001, hardback or paperback. Available from booksellers or at [gettingthingsdone.com](http://gettingthingsdone.com)

## The best practices of Getting Things Done

In order to understand our specific recommendations for Outlook 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.

### 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. For example, if your "Calls" list doesn't have every single call you need to make, your head will still have to keep remembering and reminding you about the rest of them. Trying to keep only some of them in Outlook 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 pressure of still needing to make a decision will cause you to avoid engaging with your lists.

### 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, in a process we call "The Weekly Review."<sup>2</sup>

## 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, books you might want to read, and all the things you might want to pack whenever you take a trip. The Outlook Tasks section can be a terrific list manager for your actionable items and the Outlook Notes area can serve as a very functional catalog of checklists and reference material.

---

<sup>2</sup>Visit our online store ([davidco.com/products](http://davidco.com/products)) for a free article on *The Weekly Review* or review pages 184-187 in the *GTD* book.

## Making your lists portable

Another key success factor to using Outlook 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. 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 your lists portable:

#### 1. Synchronize to a handheld

You can set up Outlook to synchronize with a Palm®, Windows Mobile® or BlackBerry® handheld, using the software that comes with each of those devices. When you configure Tasks as we suggest, you will create lists as Categories, and these will map one to one to the Task/To Do lists on the handheld. Similarly, your lists in Outlook Notes will map to the Notes/Memo function on these handhelds.



On a BlackBerry, look for the Filter option under the Tasks menu to view your Tasks by category.  
On a Palm handheld, view by Category to see your lists by category.

Before choosing a handheld device, we suggest checking with your IT department first to see what device they will support and will allow to connect to your corporate data. Whatever system you end up using, master the basics early on, so that you are 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 handheld, 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 Outlook when they are back at their workstations. This can work fine, and in some cases, because of the additional visibility and note-adding capability of paper lists, better than a digital version. Outlook Tasks and Calendar can be easily printed using the File > Print menu.

## Speed up your processing

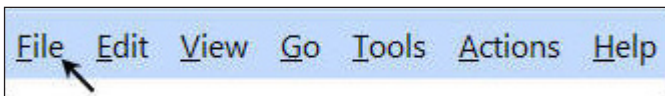
The ease of making entries as you go, as things occur to you, is essential to using Outlook for action management. The system should work almost as quickly as you think, or it won't hold up to keep you current. Subliminal resistance to your data entry process usually creates a barrier for using any digital tool as a total system. The faster you are at the keyboard, the more you will be able to use Outlook as a highly leveraged personal productivity device.

Studies show you'll be four times faster using speed keys than reaching for your mouse. If you aren't using them already, learn the speed keys for the Windows and Outlook functions you use the most.

### Standard Windows speed key combinations

- <Ctrl> **a** – Select the whole document
- <Ctrl> **c** – Copy whatever is selected to clipboard
- <Ctrl> **x** – Cut whatever is selected to the clipboard
- <Ctrl> **v** – Paste what's in the clipboard to the cursor location
- <Ctrl> **p** – Print
- <Ctrl> **z** – Undo
- <Ctrl> **y** – Redo
- <Alt> <Tab> – Switch between open Windows applications

In any Windows application, the speed keys for most menu functions within an application are the underlined letter, usually in combination with the Alt key.



### Outlook-specific speed keys

- |   |   |
|---|---|
| <Ctrl+Shift> <b>k</b> – Creates a new task          | <Ctrl> <b>1</b> – Switch to mail        |
| <Ctrl+Shift> <b>a</b> – Creates a new appointment   | <Ctrl> <b>2</b> – Switch to calendar    |
| <Ctrl+Shift> <b>n</b> – Creates a new note          | <Ctrl> <b>3</b> – Switch to contacts    |
| <Ctrl+Shift> <b>m</b> – Creates a new email msg     | <Ctrl> <b>4</b> – Switch to tasks       |
| <Ctrl+Shift> <b>e</b> – Creates a new email folder  | <Ctrl> <b>5</b> – Switch to notes       |
| <Ctrl+Shift> <b>v</b> – Moves an email message      | <Ctrl> <b>6</b> – Switch to folder list |
| <Ctrl+Shift> <b>h</b> – Create a new MS Office file | <Ctrl> <b>e</b> – Go to the search box  |
| <Ctrl> <b>n</b> – Creates new entry in current mode | <Ctrl> <b>r</b> – Reply to open message |
| <Alt> <b>g</b> – Categorizes open task              | <Alt> <b>s</b> – Send or save           |

**Note:** these shortcuts are also posted in the back of this guide.