

Getting Things Done...

FAST

The Ultimate Stress-free
Productivity System

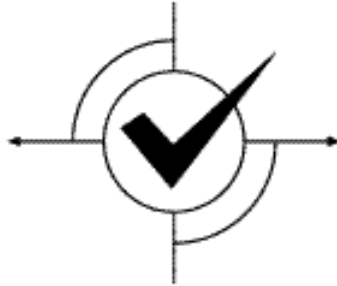


DAVID ALLEN

Nightingale
Conant

W O R K B O O K

GettingThingsDone.com



| GettingThingsDone® ...

FAST |

| The Ultimate Stress-free Productivity System

David Allen & Co. |



Introduction	2
The Fundamental Process	5
Five Phases of Mastering Workflow	7
• Collect	8
• Process	14
• Organize	17
• Review	21
• Do	22
Setting Priorities — The Multilevel Approach	24
Planning Effectively	26
• The Power of Outcome Focus	27
• How to Develop and Capture Ideas	28
• The Natural Planning Model	29
Conclusion — Next Steps	39
• Black Belt Management	
• Next Actions	

2

Introduction

What would you be doing/experiencing differently if the series works?

(What is your successful outcome?)



Introduction

How about....

getting control

getting relaxed

getting focused

getting inspired

getting going

...and getting a system to maintain the process

*Your ability to generate
power is directly
proportional to your
ability to relax.*

— David Allen

*There is usually an
inverse proportion
between the amount
something is on your
mind and the amount it
is getting done.*

— David Allen

Introduction

Anything on your mind?

1.	
2.	
3.	

The Fundamental Process

What's the Successful Outcome?

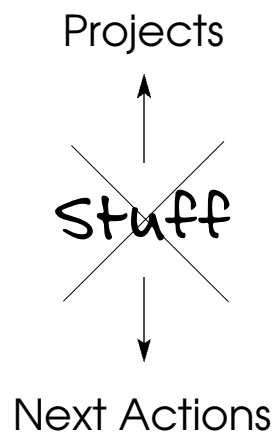
What's the Next Action?

*You need to think about
your stuff more than you
think, but not as much as
you're afraid you might.
— David Allen*

(...and put the answers in a system you trust.)

The Transformation of "Stuff":

(Stuff = Things about which there is interest, concern, attention, focus, but which still need clarification about commitment to them and tracking of them.)

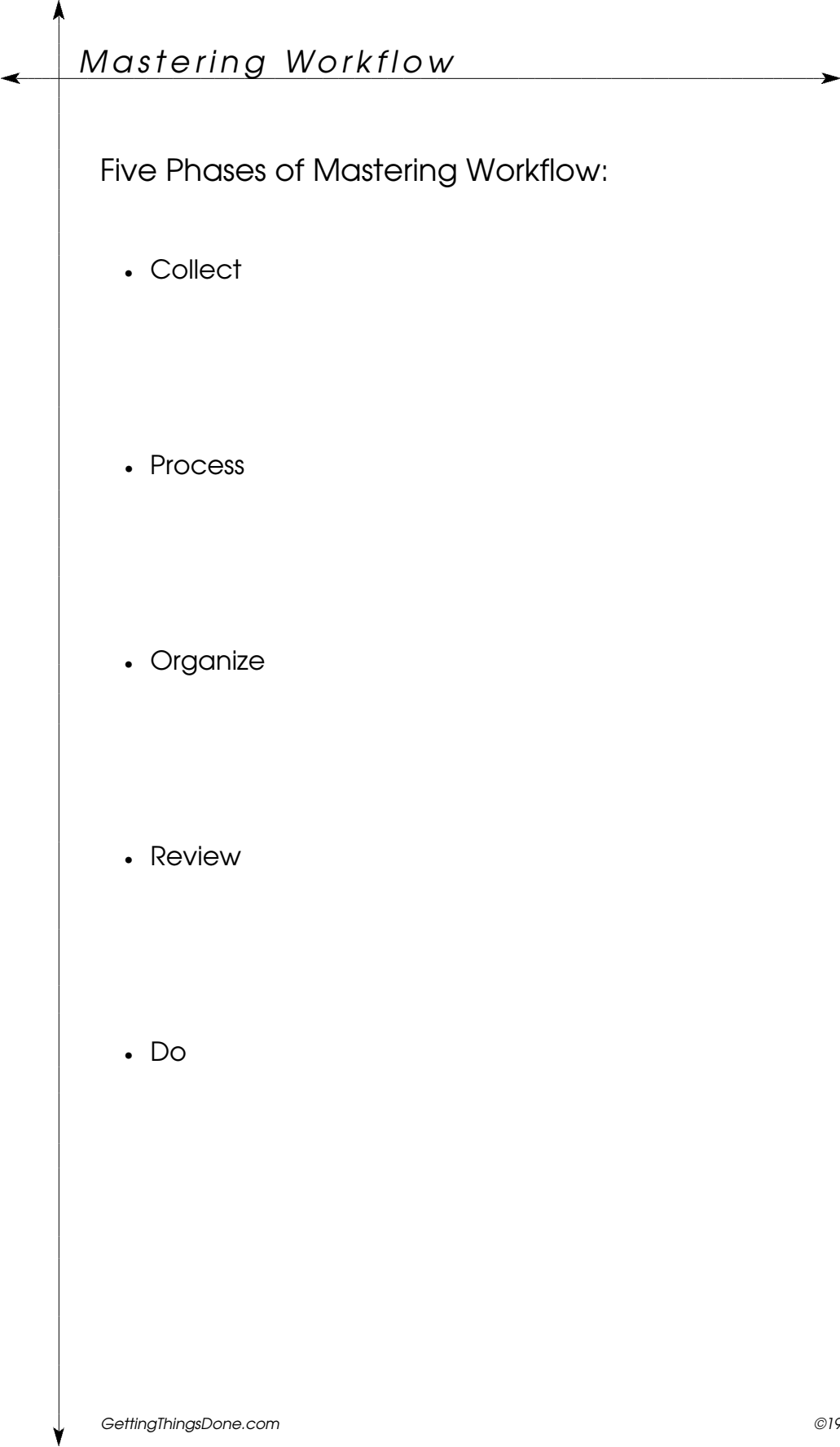


The Fundamental Process

Levels of Work:

(Where you could have "Stuff")

- 50,000 + — Life
- 40,000 ft — 3- to 5-year vision/strategy
- 30,000 ft — 1- to 2-year goals and direction
- 20,000 ft — Areas of responsibility and focus
- 10,000 ft — Current projects
- Runway — Current actions



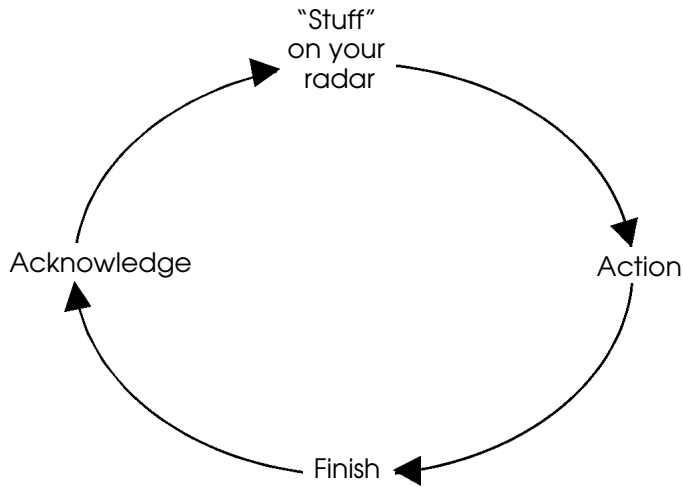
Mastering Workflow

Five Phases of Mastering Workflow:

- Collect
- Process
- Organize
- Review
- Do

Mastering Workflow: Collect

What to Collect...



...is an open loop about which there is an action required to move it to closure.

What's not:

- Reference material
- Equipment
- Decoration
- Supplies



"Psychic RAM" has limited space

Mastering Workflow: Collect

"Incompletion Triggers List"

Professional

Projects started, not completed

Projects that **need to be started**

"**Look into**" projects

Commitments/promises to others: boss/partners, colleagues, subordinates, others in organization, other professionals, customers, other organizations

Communications to make/get: calls, E-mails, voice-mails, faxes, pages, letters, memos

Writing to finish/submit: reports, evaluations/reviews, proposals, articles, marketing materials, instructions, summaries, minutes, rewrites/edits, status reports, conversation and communication tracking

Meetings: upcoming, need to be set or requested, need to be de-briefed

Significant **read/review**

Financial: cash flow, budget, balance sheet, P&Ls, forecasts, credit line, payables, receivables, petty cash, banks, investors

Planning/organizing: goals, targets, objectives, business plans, marketing plans, financial plans, upcoming events, presentations, meetings, conferences, travel, vacation

Organization development: organizational chart, restructuring, lines of authority, job descriptions, facilities, new systems, change initiatives, leadership, succession planning

Administration: legal issues, insurance, personnel, staffing, policies/procedures, training

Staff: hiring, firing, reviews, staff development, communication, morale, feedback, compensation

Systems: phones, computers, software, databases, office equipment, printers, faxes, filing, storage, furniture, fixtures, decorations, supplies, business cards, stationery

Sales: customers, prospects, leads, sales process, training, relationship building, reporting, relationship tracking, customer service

Marketing/promotion: campaigns, materials, public relations

Waiting for: information, delegated projects/tasks, pieces of projects, replies to communications, responses to proposals, answers to questions, submitted items for response/reimbursement, tickets, external actions needed to happen to continue or complete projects (decisions, changes, implementations, etc.), things ordered

Professional development: training, seminars, things to learn, things to look up, skills to develop/practice, books to read, research, formal education (licensing, degrees), career research, résumé

Professional **wardrobe**

Mastering Workflow: Collect

“Incompletion Triggers” List

Personal

Projects started, not completed

Projects that **need to be started**

Projects — other organizations: service, community, volunteer, spiritual

Commitments/promises to others: spouse, children, parents, family, friends, professionals, borrowed items

Communications to make/get: calls, e-mails, faxes, cards, letters, thank-yous

Upcoming events: birthdays, anniversaries, weddings, graduations, outings, holidays, vacations, misc. travel, dinners, parties, receptions, cultural events, sporting events

Family: projects/activities with spouse, children, parents, relatives

Administration: home office supplies, equipment, phones, answering machines, computers, Internet, TV, VCR, appliances, entertainment, filing, storage, tools

Leisure: books, music, videos, travel, places to visit, people to visit, Web surfing, photography, sports equipment, hobbies, cooking

Financial: bills, banks, investments, loans, taxes, budget, insurance, mortgage, accountants

Legal affairs

Waiting for: mail order, repairs, reimbursements, loaned items, information, rsvp’s

Home/household: real estate, repairs, construction, remodeling, landlords, heating and a/c, plumbing, electricity, roofing, landscaping, driveways, garages, walls, floors, ceilings, decor, furniture, utilities, appliances, lighting/wiring, kitchen stuff, laundry, places to purge, cleaning, organizing

Health: doctors, dentist, optometrist, specialists, checkups, diet, food, exercise

Personal development: classes, seminars, education, coaching, career, creative expressions

Transportation: autos, bikes, motorcycles, maintenance, repair, commuting

Clothes: professional, casual, formal, sports, accessories, luggage

Pets

Errands: hardware store, pharmacy, department stores, bank, cleaners, stationers, malls, gifts

Community: neighborhood, neighbors, service work, schools

Mastering Workflow: Collect

The 3 Ways to Relieve the Stress of Internal Conflict (Broken Agreements):

- Don't make the agreements
- Keep your agreements
- Renegotiate the agreements

You can only feel good about what you are not doing, when you know what you are not doing.

— David Allen

The problem is never how to get new, innovative thoughts into your mind, but how to get old ones out. Every mind is a building filled with archaic furniture. Clean out a corner of your mind and creativity will instantly fill it.

— Dee Hock

Use your mind to think about things, not to keep thinking of them.

— David Allen

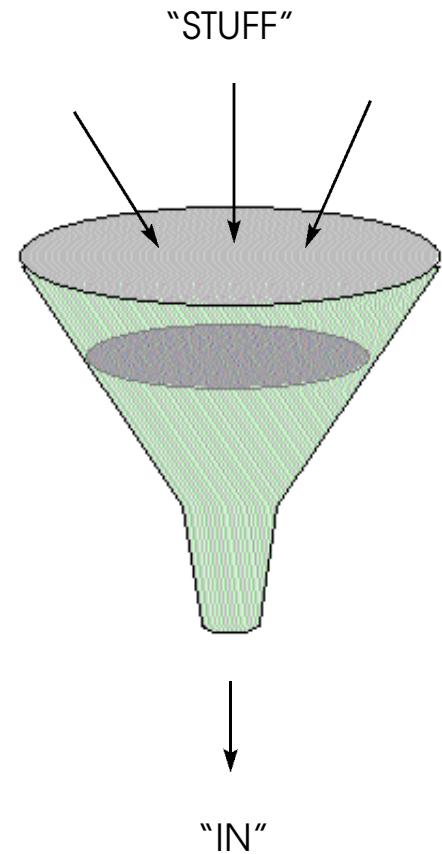
Mastering Workflow: Collect

Collection Tools

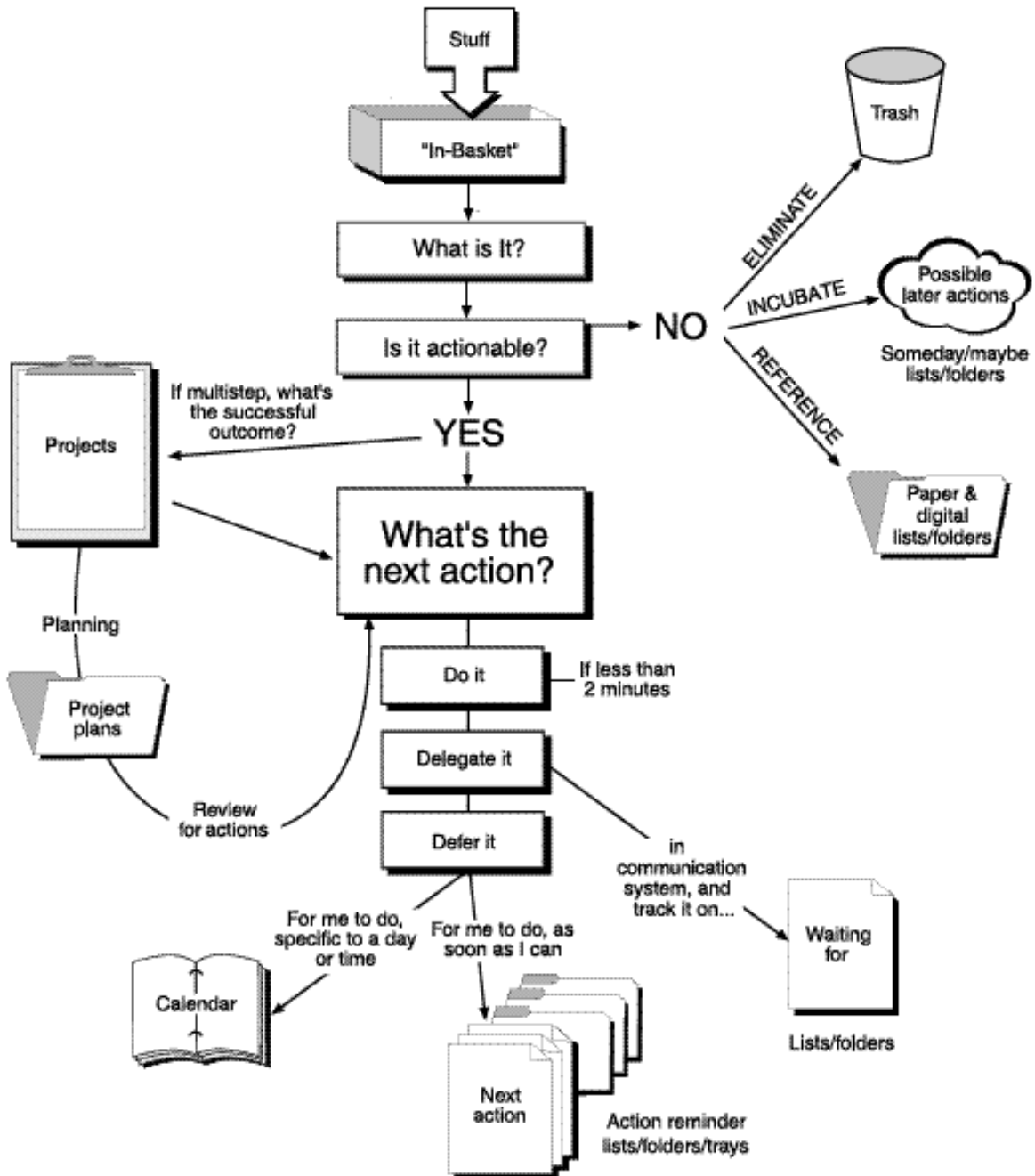
- Physical in-basket(s)
- Paper-based notes/journals/pads
- Electronic notes/journals/pads
- Voice-mail/answering machines
- E-mail
- Dictation tools

Collecting — Success Factors

- Get it out of your head
- Minimal number of locations
- Empty them regularly



Mastering Workflow: Process



Mastering Workflow: Process

Project Verbs:

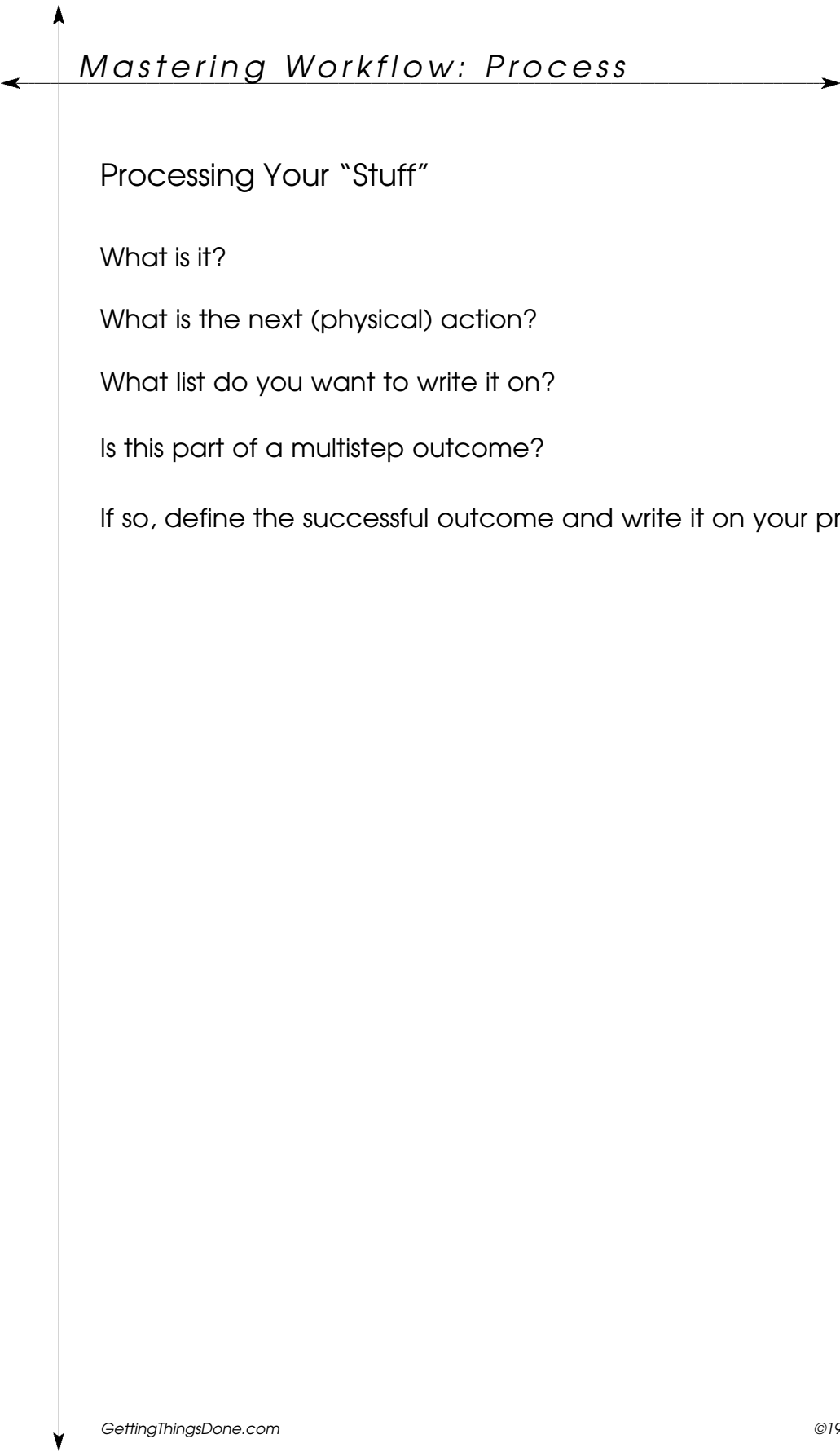
Finalize...	Resolve...	Handle...
Look into...	Submit...	Maximize...
Clarify...	Reorganize...	Publish...
Organize...	Design...	Complete...
Ensure...	Roll out...	(Etc...)
Update...	Install...	
Implement...	Set-up...	

Next-Action Verbs:

Call...	Organize...	Review...
Buy...	Fill out...	Find...
Read...	Measure...	Talk to (direct)...
Purge...	Look into (Web)...	Gather...
Print...	Take...	Waiting for...
Load...	Draft...	(Etc...)
E-mail...		

Examples:

Project/Successful Outcome <i>(What's the larger result desired? How will you know when it is done?)</i>	Next Action <i>(What do you need to do that? Do you have everything you need?)</i>
Reorganize the office	Call Susan re: source for filing cabinets
Implement new fiscal year budget	E-mail Bill for copy of last year's budget
Research relationship w/J. Smith Inc.	Draft proposal ideas for alliance
Get new car	Research Web sources for cars
Hire Marketing Director	Talk to Sean re: job description



Mastering Workflow: Process

Processing Your “Stuff”


What is it?

What is the next (physical) action?

What list do you want to write it on?

Is this part of a multistep outcome?

If so, define the successful outcome and write it on your project list.



Mastering Workflow: Organize

The Primary Action Lists

- Projects
- Calendar
 - Time-specific actions
 - Day-specific actions
 - Day-specific information
 - ...and that's all!
- Next Actions
- Waiting For...

More Advanced Action List Options

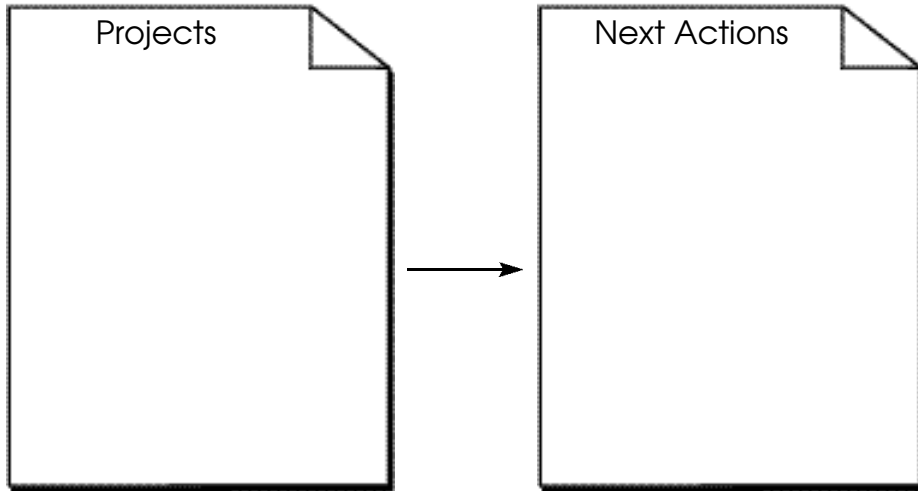
- Larger outcomes (goals, objectives, visions, values)
- Action lists sub-categorized
 - Calls, Computer, At Office, At Home, Errands, etc.
 - Agendas (people and meetings)
- Checklists

E-mail and Paper Management Options

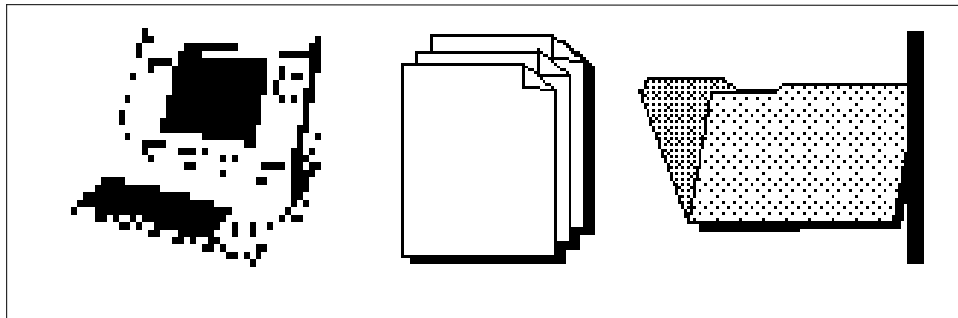
- E-mail: "ACTION", "WAITING FOR" folders
- Paper: Actionable trays or folders (e.g., "Read/Review")

Mastering Workflow: Organize

Organizing Project Support Material



Project Plans, Reference, and Support Materials



Mastering Workflow: Organize

Reference Systems

- Separate reference from action reminder material (or you'll tend to go numb to the area)
 - Especially: project/client folders, bulletin boards, credenzas, desk and table tops, magnets on refrigerator doors
- General reference = one alpha (A-Z) system (easier to find if you forget how it was labeled)
 - File by topic, company, or person
- Typeset labels
- Less than 60 seconds to make a new file for a new topic (otherwise it will get stacked instead of filed)
 - Have tools at hand — fresh file folders, labels, labelers
 - Have access close to (or at) work station
- Drawers less than 3/4 full
- Fun and easy to use (you're willing to make a file for anything)
- Purge files yearly (gives the freedom to keep anything you might need, knowing it's not going into a "black hole")

Mastering Workflow: Review

The Critical Success Factor — The Weekly Review

- Gather and process all your “stuff”
- Review your system
- Update your lists
- Get clean, clear, current, and complete

You need to spend quality time, detached from the daily grind, thinking about, getting control of, and managing the daily grind.

— David Allen

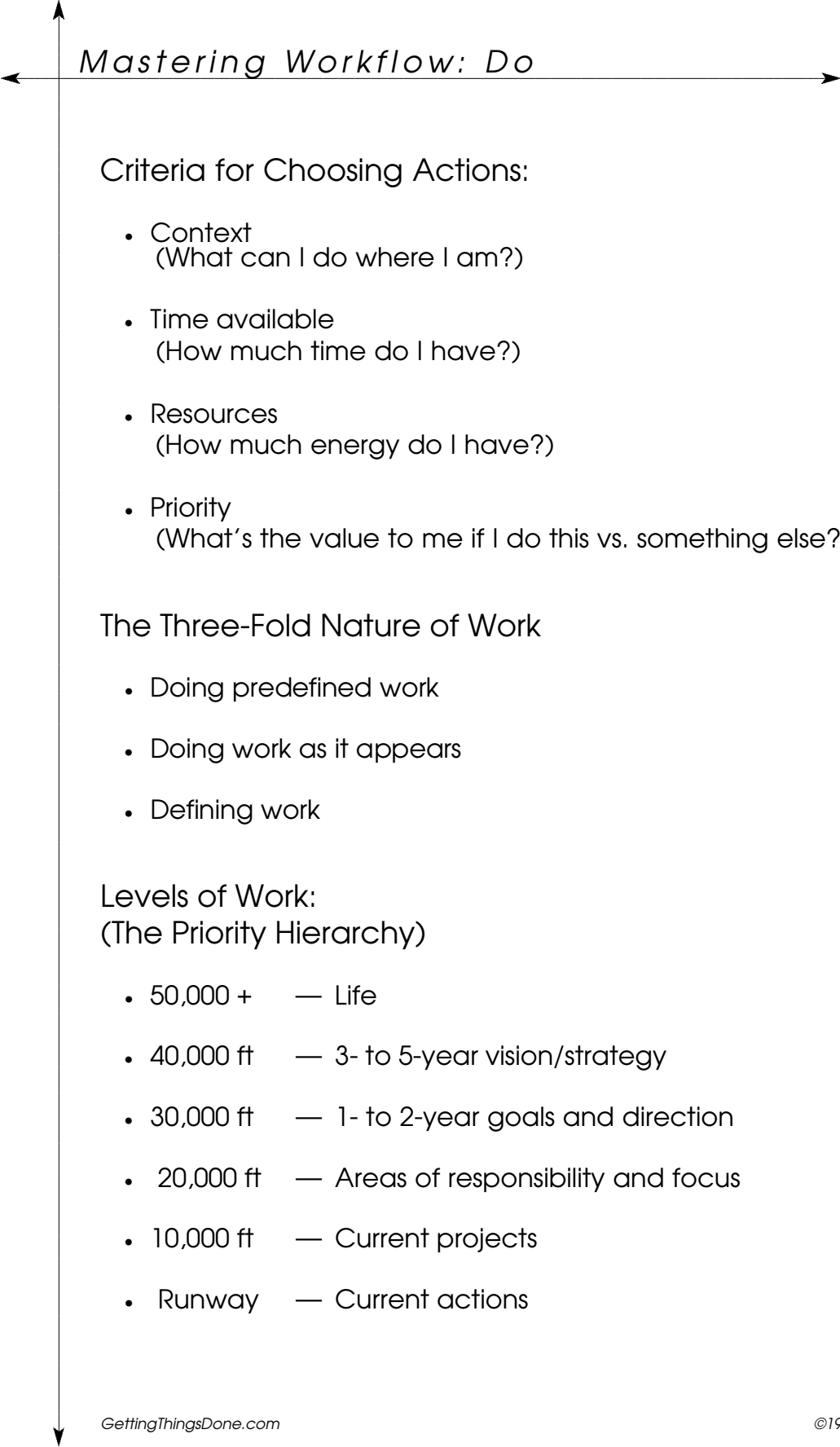
Loose Papers	Pull out all scraps of paper, business cards, receipts, and miscellaneous paper. Put into your in-basket to process.
Process Your Notes	Review any “Journal/Notes” types of entries, meeting notes, and miscellaneous notes scribbled on notebook paper. Decide and enter action items, projects, waiting-fors, etc. as appropriate.
Previous Calendar Data	Review expired daily calendar pages in detail for remaining action items, reference data, etc. and transfer into the active system.
Upcoming Calendar	Overview upcoming calendar events — long- and short-term. Capture actions triggered.
Empty Your Head	Put in writing (in appropriate categories) any new projects, action items, waiting-fors, someday/maybes, etc. not yet captured.
Review “Projects” (and Larger Outcome) Lists	Evaluate status of projects, goals, and outcomes one by one, ensuring at least one current action item on each.
Review “Next Action” Lists	Mark off completed actions. Review for reminders of further action steps to record.
Review “Waiting-For” List	Record appropriate actions for any needed follow-up. Check off received ones.
Review “Pending” and Support Files	Browse through all work-in-progress support material to trigger new actions, completions, waiting-fors, etc.
Review Any Relevant Checklists	Is there anything you haven’t done that you need to do?
Review “Someday/ Maybe” List	Review for any projects that may now have become active, and transfer to “Projects.” Delete items no longer of interest.
Be Creative and Courageous	Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add to your system???

Record “Weekly Review” in your calendar for the next month (if it is not a habit already)!!!

Mastering Workflow: Do

Curing Procrastination

Causes	Cures
<p>Apathy</p>	<p>Objectify, review, do it, or feel OK for <u>not</u> doing it</p>
<p>Anxiety</p> <ul style="list-style-type: none"> Too big or complex Physical discomfort Emotional discomfort Bottom line: Fear of loss of control 	<p>Decide next action</p> <p>Focus on successful outcome</p>



Mastering Workflow: Do

Criteria for Choosing Actions:

- Context
(What can I do where I am?)
- Time available
(How much time do I have?)
- Resources
(How much energy do I have?)
- Priority
(What's the value to me if I do this vs. something else?)

The Three-Fold Nature of Work

- Doing predefined work
- Doing work as it appears
- Defining work

Levels of Work: (The Priority Hierarchy)

- 50,000 + — Life
- 40,000 ft — 3- to 5-year vision/strategy
- 30,000 ft — 1- to 2-year goals and direction
- 20,000 ft — Areas of responsibility and focus
- 10,000 ft — Current projects
- Runway — Current actions

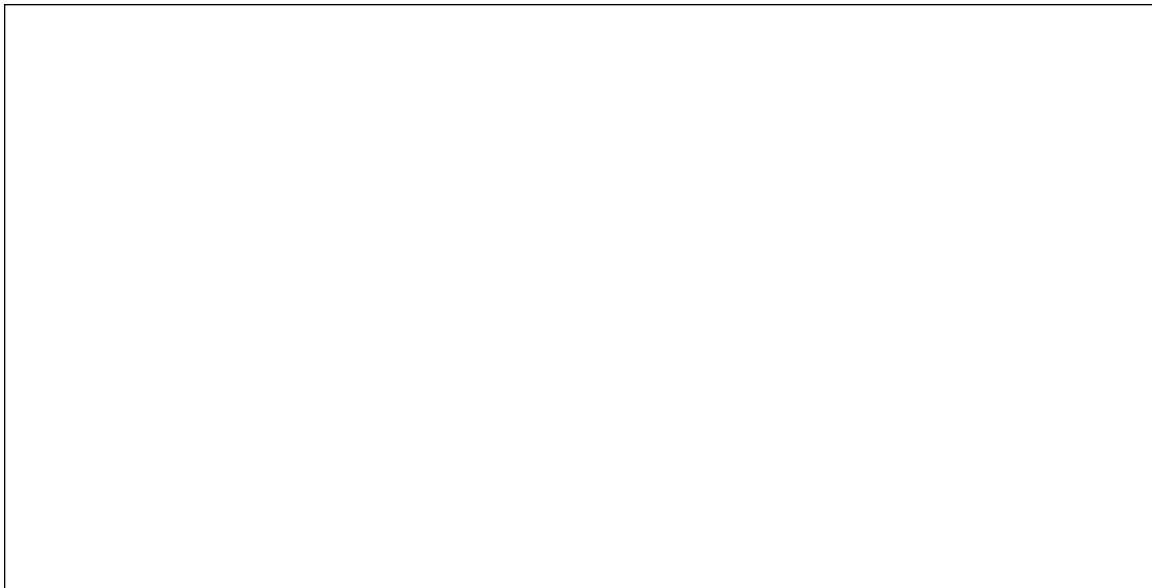
Setting Priorities

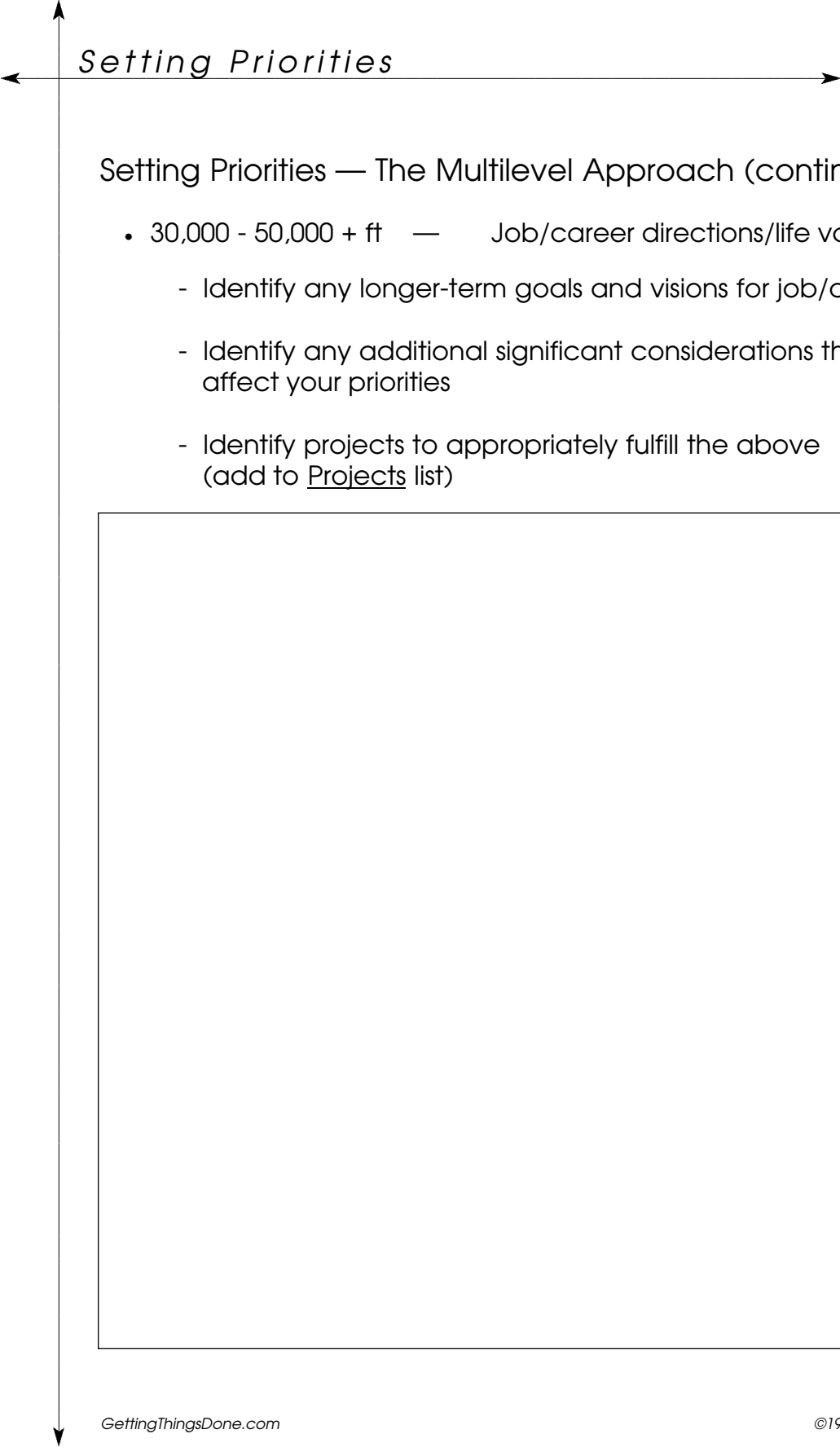
Setting Priorities — The Multilevel Approach

- Runway — Current actions
 - Complete inventory of action reminders

- 10,000 ft — Current projects
 - Complete Projects list

- 20,000 ft — Current job/areas of responsibility and focus
 - Identify key areas of responsibility/focus/interest in your job
 - Identify key areas of responsibility/focus/interest in your life
 - Identify projects to appropriately fulfill the above
(add to Projects list)

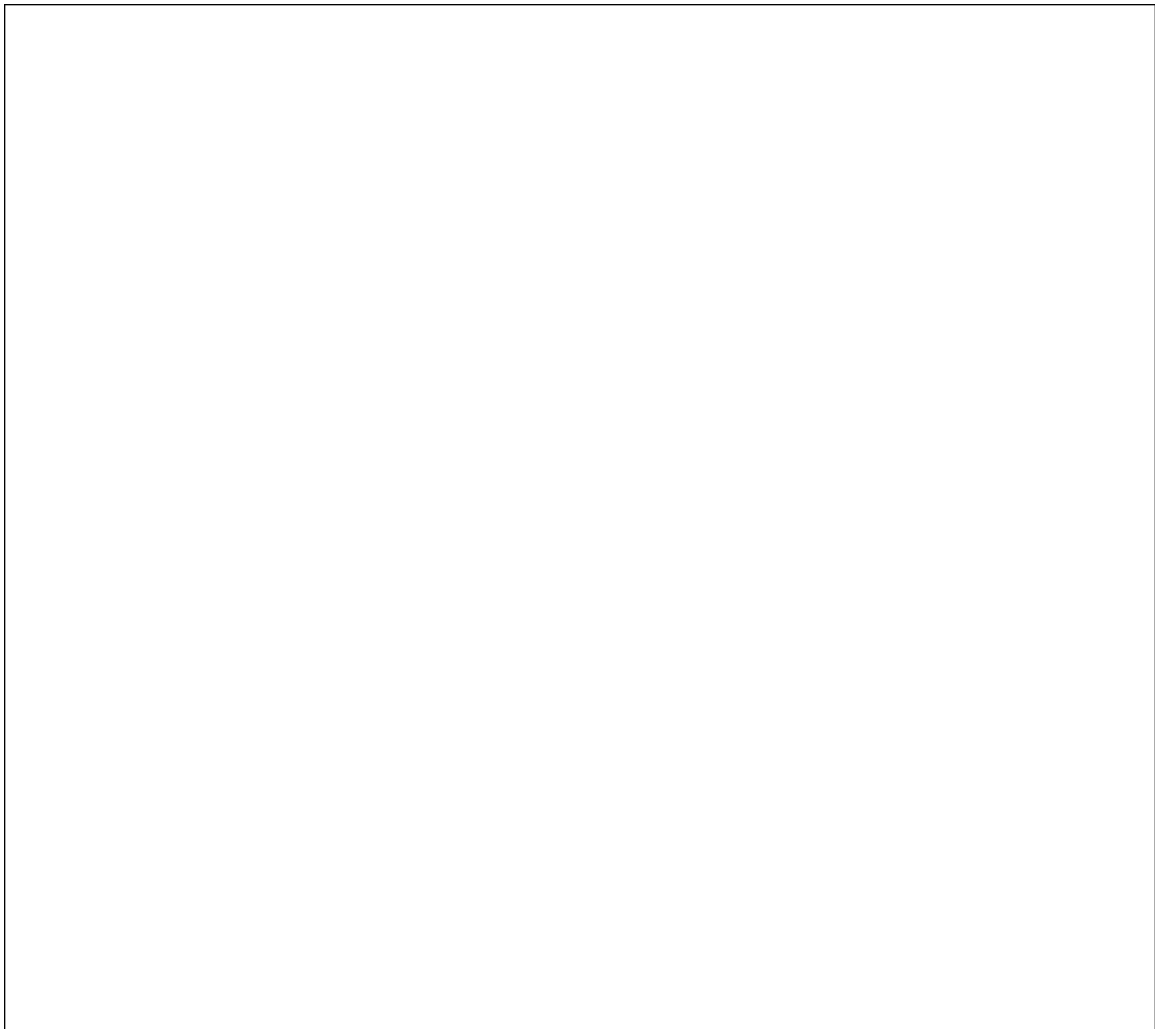


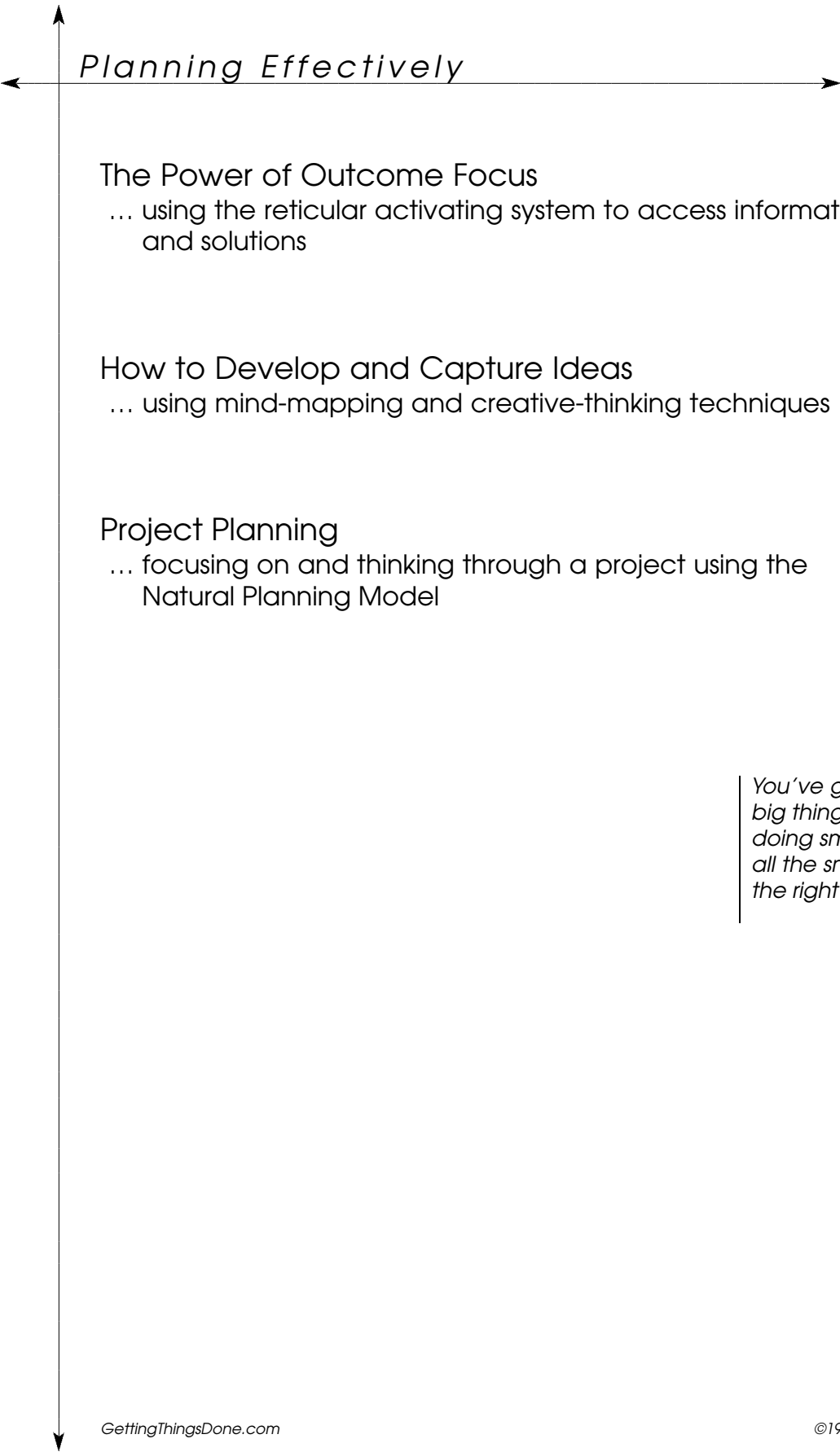


Setting Priorities

Setting Priorities — The Multilevel Approach (continued)

- 30,000 - 50,000 + ft — Job/career directions/life values/visions
 - Identify any longer-term goals and visions for job/career/life
 - Identify any additional significant considerations that could affect your priorities
 - Identify projects to appropriately fulfill the above (add to Projects list)





Planning Effectively

The Power of Outcome Focus

... using the reticular activating system to access information and solutions

How to Develop and Capture Ideas

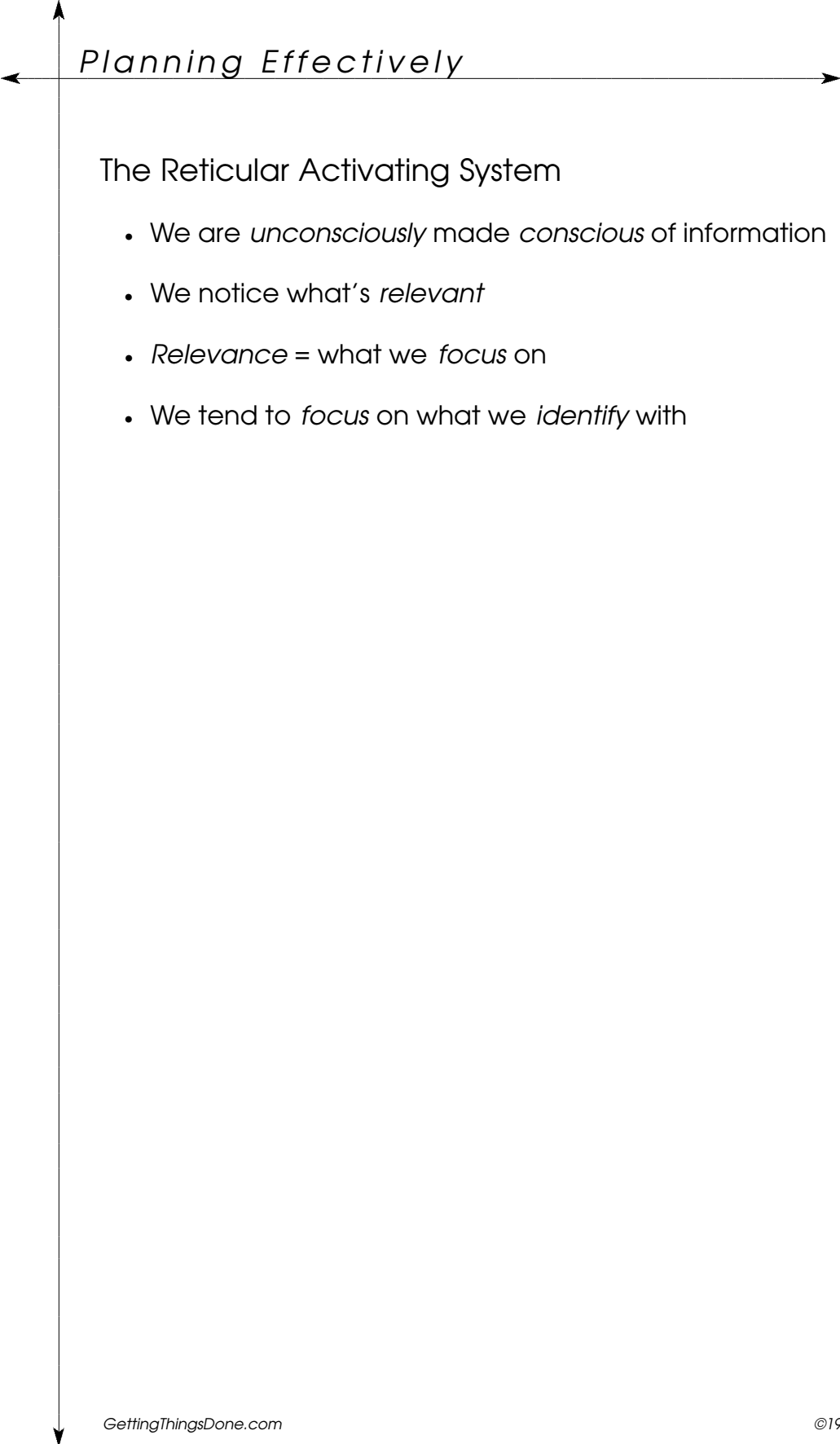
... using mind-mapping and creative-thinking techniques

Project Planning

... focusing on and thinking through a project using the Natural Planning Model

You've got to think about big things while you're doing small things, so that all the small things go in the right direction.

— Alvin Toffler



Planning Effectively

The Reticular Activating System

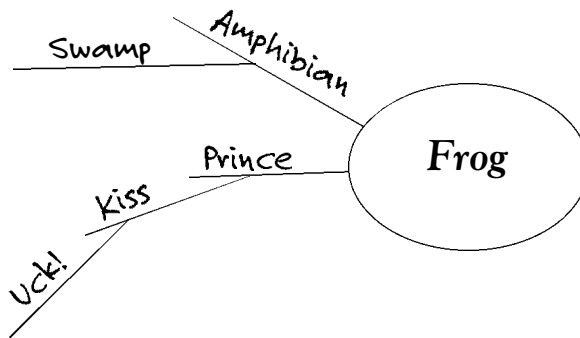
- We are *unconsciously* made *conscious* of information
- We notice what's *relevant*
- *Relevance* = what we *focus* on
- We tend to *focus* on what we *identify* with

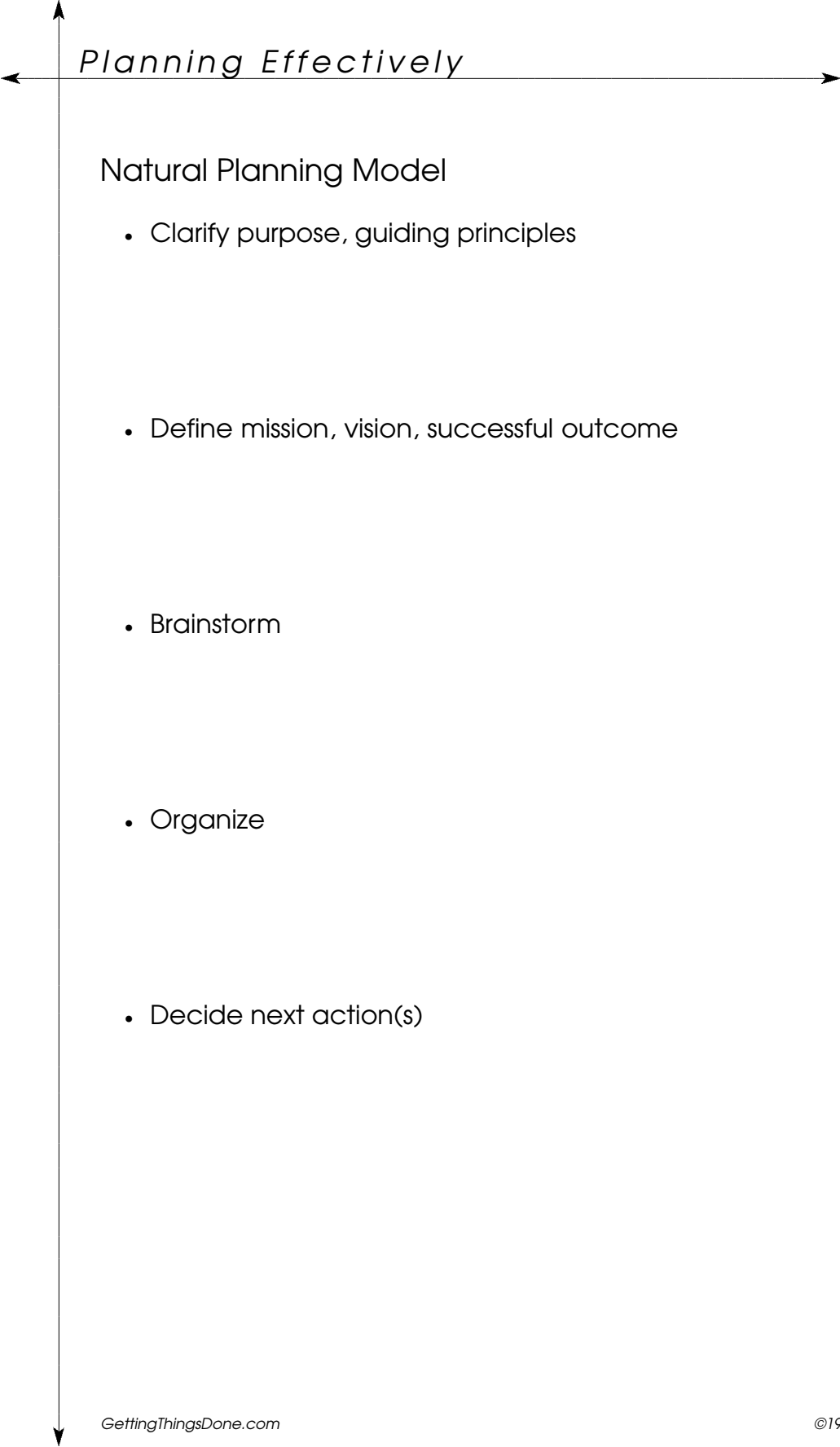
Planning Effectively

Mind-Mapping and Brainstorming

- No judgement, challenge, evaluation, criticism
- Go for quantity, not quality
- Put analysis and organization in background

Continue brainstorming the sample mind map of “frog” below:





Planning Effectively

Natural Planning Model

- Clarify purpose, guiding principles
- Define mission, vision, successful outcome
- Brainstorm
- Organize
- Decide next action(s)

Planning Effectively

Purpose

- Why am I (are we) doing this?
- Up-level your perception of “Why?” appropriately (Why am I really doing this?)

Guiding Principles

- I would give others totally free rein to do this, as long as they...

Key Project	Purpose(s)	Guiding Principles
Produce a promotional video	To increase customer awareness of and interest in our product	Cost-effective, fun, reflecting our desired image in the market

Fanaticism consists of redoubling your efforts when you have forgotten your aim.

— George Santanyana

Simple, clear purpose and principles give rise to complex and intelligent behavior. Complex rules and regulations give rise to simple and stupid behavior.

— Dee Hock

Planning Effectively

Purpose (Why?)

Purpose is defined by answering the question, "Why are we doing this?" The purpose should reflect the primary criterion for making decisions about the goals, the organization and the priorities of the project or the organization. It should reflect the benefit to all the stakeholders. It is a motivational factor, not a differentiating factor.

Examples:

For creating a budget:

- To effectively manage the resource allocation of the organization to fulfill its purpose.

For reengineering a company or department:

- To enhance customer relationships with our company.
- To increase our market share.
- To attract the best people to fill positions available.
- To effectively allocate responsibility and maximize productivity of our human resources.

In creating a form:

- To get the right information to the right person.
- To get the right information into the system in the right way.

To write a book:

- To educate a large number of people through an easily accessible medium.
- To establish credibility, positioning, and a positive image in the market place.

Guiding Principles

What are the core values and beliefs you want people to hold while they're making decisions? These are the parameters within which decisions are to be made. What do you absolutely NOT want to happen? From there, you can determine the guiding principles.

Planning Effectively

Mission, Vision, Successful Outcome

- View the project from beyond the completion date
- Envision wild success (suspend “Yeah, but...”)
 - For me?
 - For the customer?
 - For my team/family?
 - For my division?
 - For my company?
 - For my community?
 - For the world?
- Capture features, aspects, qualities in place

Pick one strategic project and define the successful vision:

*Imagination is more
important than knowledge.*
— Albert Einstein

Planning Effectively

Mission, Vision, Successful Outcome (What?)

The mission/successful outcome and vision describe what you are going to do to manifest the purpose. The mission/successful outcome has a finish line and a specific time frame for its achievement. It is the long-term goal or objective. The vision is the mission described as having been achieved in vivid detail. It should release people's passion and generate the commitment to achieve high performance. It's a "big hairy audacious goal." Keep it at least 50% believable and use descriptive language.

Examples:

For a budget:

By October 1, we will have the final budget approved by the executive committee. The budget will accurately reflect our willingness to allocate our resources in a way that supports each team in delivering our product to our customers. We will experience a major win as we will have come in under budget. Our department will receive acknowledgment for the work we did to support the company's success.

For reengineering:

By June 1, we will have established and communicated a new organizational structure to the department manager level. The managers will be enthusiastic about the new structure and will have a thorough understanding of their roles and the roles of their direct reports. The managers will communicate clearly with their direct reports. All the systems will have been comprehensively created to support our people in doing their jobs. Customers will give us positive feedback about the changes they are perceiving in the service we are provide for them. By September 1st, we will have increased customer activity by 10%. There will be a renewed vitality with staff at every level.

For creating a form:

By the end of the third quarter this year, a new form will be created, implemented and tested. The form will be easy to use and will give us the information we need to maintain quality customer service. The form will be available to staff either electronically or in hard copy. It will be clear and concise and the staff will have an understanding of the pertinent information in relationship to their job. We will review the form every six months to update it and/or adjust it as is appropriate.

To write a book:

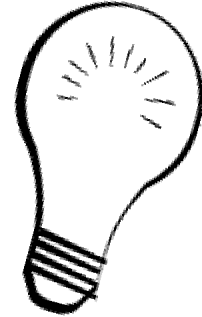
I will write a best seller (selling at least 50,000 copies). The concepts I will introduce will be easy to understand and people will be able to apply the technology in their own lives. The terms I will use will become common in everyday language. People will receive tremendous value from the information and they will spread the word. I will be asked to speak at Fortune 500 companies for a premium rate. I will appear on at least (but not limited to) three national talk shows.

Planning Effectively

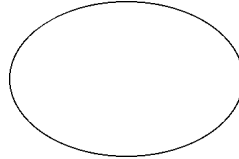
Brainstorm

What are all the things that occur to you about making this happen?

- No judgement, challenge, evaluation, criticism
- Go for quantity, not quality
- Put analysis and organization in background



Mind-map the project:



The best way to get a good idea is to get lots of ideas.

— Linus Pauling

Planning Effectively

Project “Brainstorming Triggers” List:

Resources

Whose input do we need?
 Whose input could we use?
 Has anything like this been done before?
 What mistakes can we learn from?
 What successes can we learn from?
 What resources do we have?
 What resources might we need?

Executive Issues

How does this relate to the strategic plan?
 How does it relate to other priorities, directions, goals?
 How will this affect our competitive position?

Administration

Who’s accountable for this project’s success?
 Lines of communication?
 Methods of reporting?
 What structures do we need?
 What planning is still likely to be required?
 What re-grouping will we need? How often?
 What people do we need?
 Current staffing?
 Hiring?
 Subcontractors?
 Consultants?
 How do we get involvement?
 What skills are required?
 Who needs to know how to do what?
 What training do we need?
 How do we get it?
 What other communication do we need?
 Who needs to be informed as we go along?

GettingThingsDone.com

What policies/procedures are affected? What are needed?
 What about morale? Fun?
 Staffing?

Finance

What will this cost?
 How do we get it?
 What might affect the cost?
 Might we need additional \$?
 What are the potential payoffs (\$)?
 Who signs the checks?

Operations

What is the timing?
 Hard deadlines?
 What might affect timing?
 Who’s going to do the work?
 How do we ensure complete delivery?

Quality

How will we monitor our progress?
 How will we know if we’re on course?
 What data do we need, when?
 What reports, to whom, when?

Politics

Whose buy-in do we need?
 How can we get it?

Stakeholders - Considerations?

Board
 Stockholders
 Employees
 Suppliers
 Customers
 Community

Legal

Issues?
 Regulations?

Space/Facilities/Equipment

What requires room?
 How do we get it?
 What tools do we need?
 When?
 Phones?
 Computers?

Research

What might we need to know?

Public Relations

Is there value in others knowing about this?
 How do we do that?

Risks

What could happen?
 Could we handle it?

Creative Thinking

Who would have concern about the success of this project? What would they say, ask, or input that we haven’t yet?
 What’s the worst idea we can imagine about doing this project?
 What is the best idea we can imagine about doing this project?
 What is the most outrageous thing we can think of about this project?
 How would a 12-year-old kid relate to this project?
 What would make this project particularly unique?

Planning Effectively

Organizing

- Identify significant pieces
- Sort by (either/and):
 - Components
 - Sequence
 - Priorities
- Detail to required degree

Organizing Formats

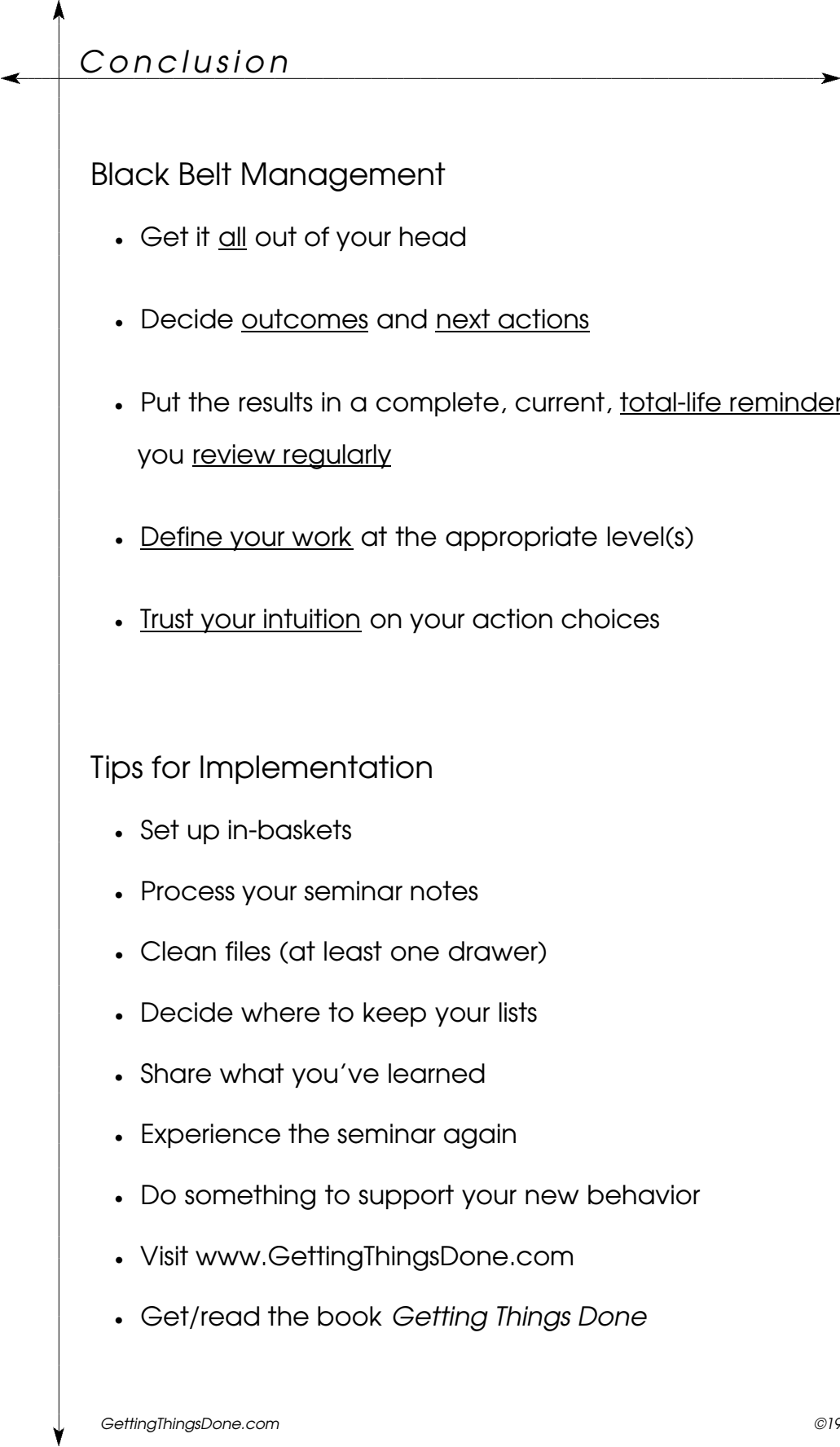
- Simple lists
- Outlines
- Project planning forms
- Charting: PERT, GANTT
- Project planning software

Planning Effectively

Organizing

Rough draft a plan for the project:

A large, empty rectangular box with a thin black border, intended for the user to draft a rough plan for the project.



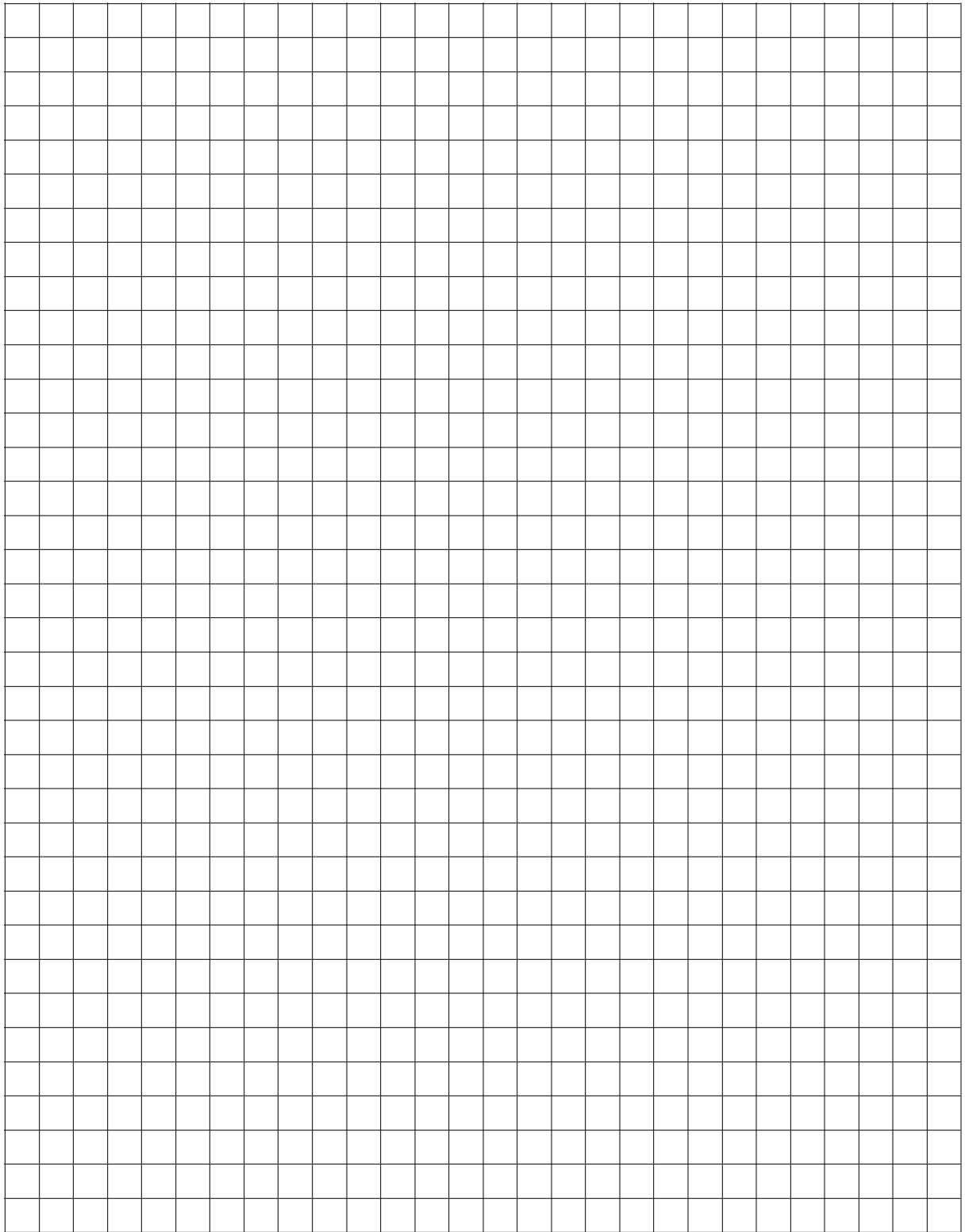
Conclusion

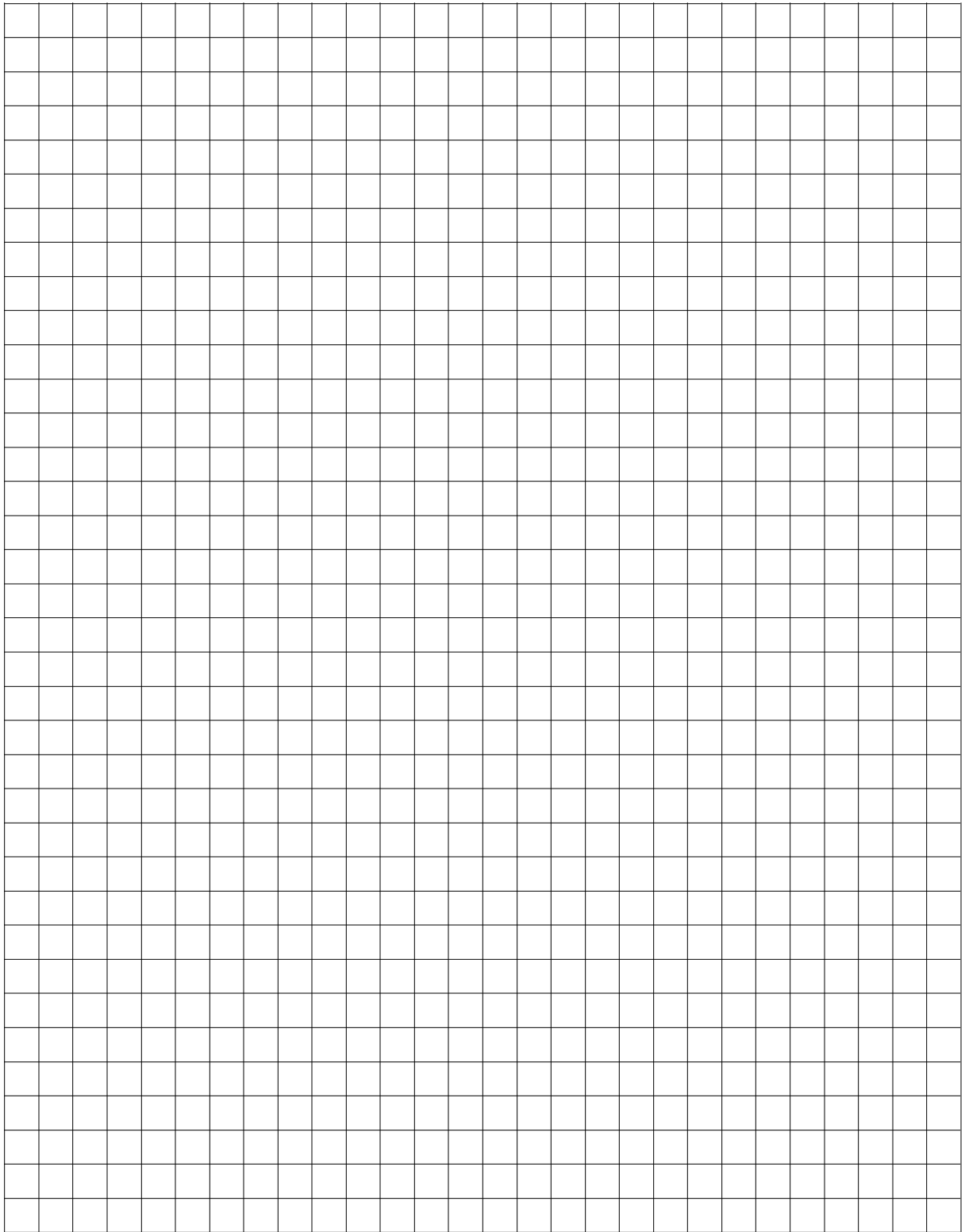
Black Belt Management

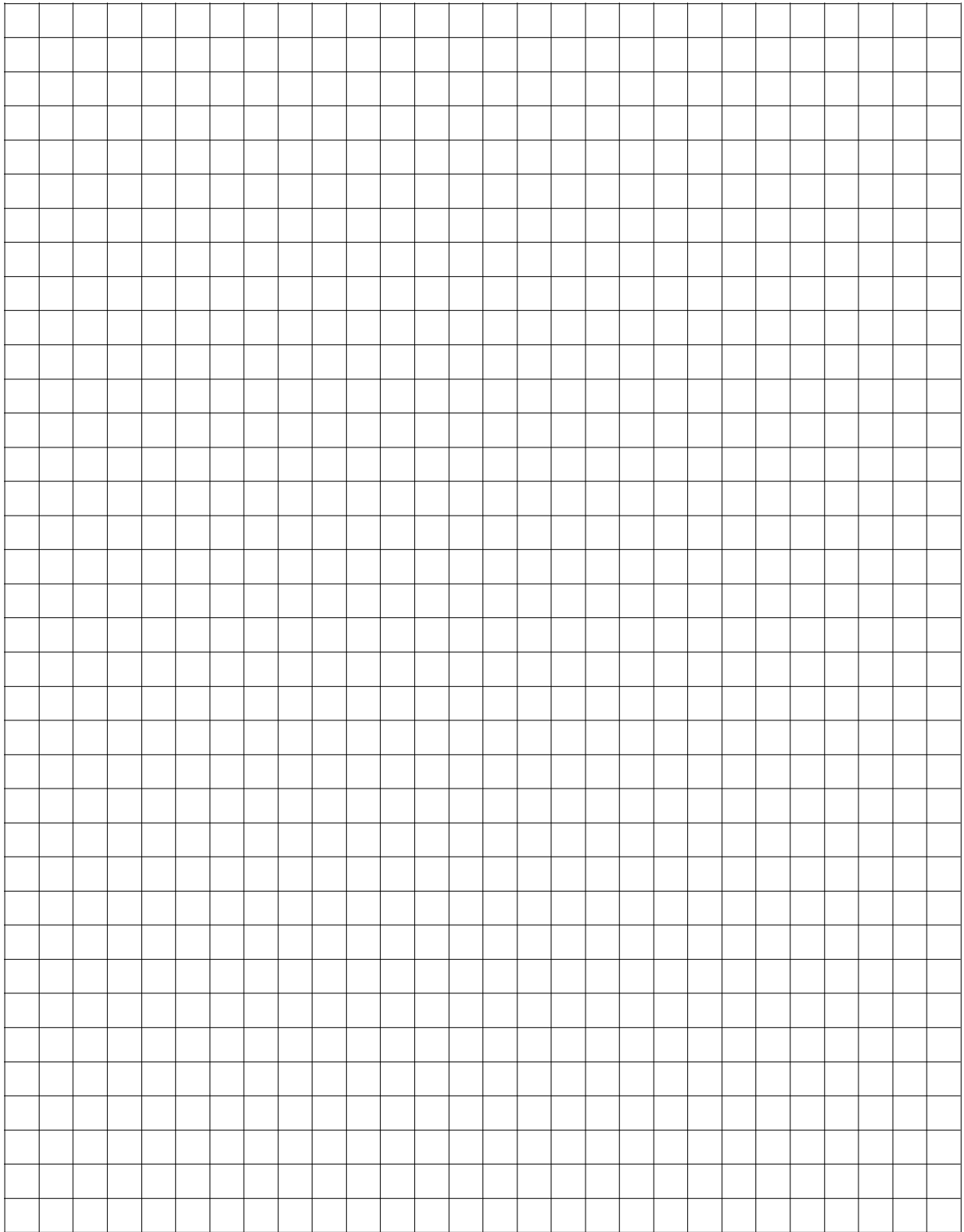
- Get it all out of your head
- Decide outcomes and next actions
- Put the results in a complete, current, total-life reminder system that you review regularly
- Define your work at the appropriate level(s)
- Trust your intuition on your action choices

Tips for Implementation

- Set up in-baskets
- Process your seminar notes
- Clean files (at least one drawer)
- Decide where to keep your lists
- Share what you've learned
- Experience the seminar again
- Do something to support your new behavior
- Visit www.GettingThingsDone.com
- Get/read the book *Getting Things Done*







Thank you for participating with us. For further information,
we can be reached at:

David Allen & Co.
1674 McNell Road
Ojai, CA 93023
805-646-8432
Fax 805-646-7695
info@davidco.com
www.davidco.com

*A vision without a task is
but a dream, a task
without a vision is
drudgery, a vision and a
task is the hope of the
world.*

*- from a church in
Sussex, England,
c.1730*

Expand Your Library with
These Exciting Programs from Nightingale-Conant

Fully Alive, Fully Human

Ten Power Habits for Making Your Life a Masterpiece

By Ed Foreman

21270A/21270CD

Unleash the Power Within:

Personal Coaching to Transform Your Life

By Tony Robbins

19990A/19990CD

The Power of Purpose:

How to Create the Life You've Always Wanted

By Les Brown

17780A/17780CD

Million Dollar Habits:

12 Power Practices to Double or Triple Your Income

By Brian Tracy

19850A/19850CD

Quantum Memory Power:

Learn to Improve Your Memory with the World Memory Champion!

By Dominic O'Brien

22010A/22010CD

All available from Nightingale-Conant at 1-800-525-9000

www.nightingale-conant.com

**Nightingale
Conant**

Nightingale-Conant

1-800-525-9000

www.nightingale.com