

Getting Things Done

An add-in program for
Microsoft Outlook

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Introduction

Getting Things Done (GTD) is a method developed by productivity guru David Allen (see www.davidco.com/) for managing all the “stuff” we need to deal with in our work or private lives. His book costs \$15 and I recommend it highly. Our work “stuff” includes such things as emails, research projects, meetings, committees, reports and other information that we all try to keep track of in what David calls our “psychic RAM”. This psychic RAM tends to clutter our minds and creates the bad kind of stress everyone complains about. The goal of GTD is an uncluttered “clear” mind, present on the task at hand. Stuff, using the GTD method, is either dealt with immediately or clarified and placed in a trusted system that is reviewed as often as necessary. Figure 1 graphically outlines the GTD concept. The “IN Box” is the trusted source and for now try to think of this as a digital file on your computer.

Once information has been collected, GTD requires processing, organizing and review. Processing asks the question “*Is the item actionable?*” If it is not – toss it (**trash**), tickle it for possible later action (**incubate**), or file it as **reference**. If it is actionable – decide the very next physical action, which you **Do** (if less than two minutes), **Delegate** (and track on a “waiting for” list), or **Defer** (put on an action reminder list or in an action folder). If one action will not close the loop, then identify the commitment as a “**Project**” and put it on a reminder list of projects. Always try to break projects down into actionable tasks.

Group the results of your processing into one of the 6 retrievable and/or reviewable key **action categories**.

- **Projects** (projects you have a commitment to finish – composed of two or more actions – try to breakdown projects into one of the next 3 actions described below)
- **Calendar** (actions with deadlines)
- **Next Actions** (ASAP actions)
- **Waiting For** (projects or actions that you’ve delegated to someone else and that you care about)
- **Some day or maybe** (these indicate “on-hold” for possible actions at a later date) and
- **Reference** (has no action, but needs to be retrievable)

Assigning **sub-categories** to each of the first 4 key action categories will help make it easier to take action based on where the action needs to take place. The “@” symbol is a short-hand method for describing these sub-categories. Common examples are listed below but you can make your own as it makes sense to you.

- @ Calls (list of action items when you have time to make calls)
- @ Errands (list of action items when you are running around)
- @ Computer (list of action items that you can only do in front of a computer)
- @ Home (list of action items that you can do when you are at home)

Review calendar and action lists daily (or whenever you could possibly do any of them – @calls, etc.). Don’t forget to review **Waiting For Actions**, as one of your actions maybe to remind those you delegated a task to finish it. Also, periodically review the **Some Day/Maybe** list to see if they should become actions or projects. Now that you understand the basics of GTD let’s see how to apply it to email within Outlook. If you use MS Outlook for

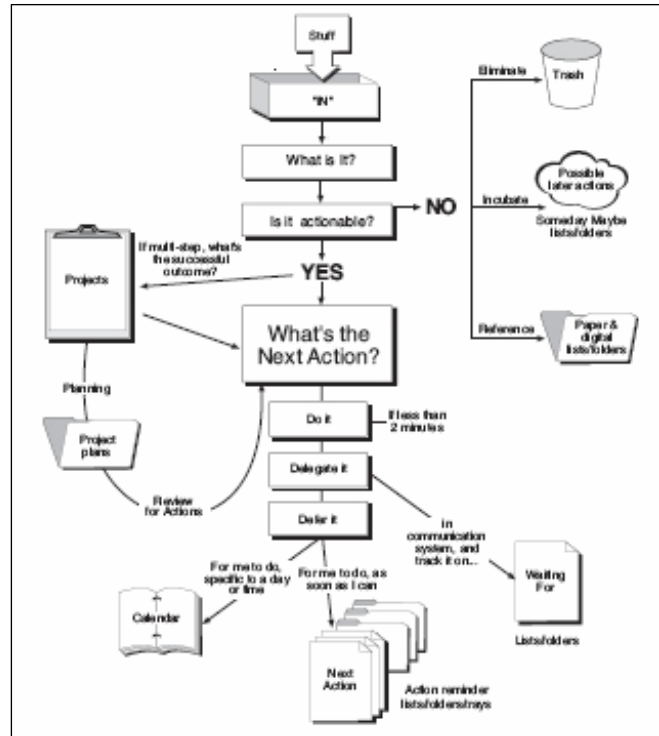


Figure 1 David Allen’s GTD Workflow

your email, NetCentrics has developed a nifty add-in program that will let you apply the GTD methods to managing your email. It costs about \$70. Outlook GTD add-in from NetCentrics (www.netcentrics.com)

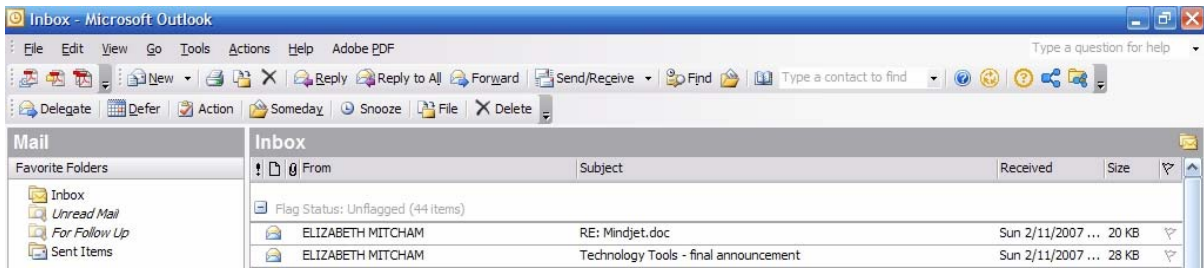


Figure 2 GTD Outlook Add-in Toolbar

Figure 2 shows what Outlook looks like when the GTD add-in is installed. Note the new toolbar that starts with Delegate and includes Defer, Action, Someday, Snooze, File and Delete. All essential elements to the workflow process described in the introduction to GTD above. Figure 3 shows the new folders that are also added. They include @Action, @Deferred, @File, @Projects, @Waiting For, Snooze, and Someday.

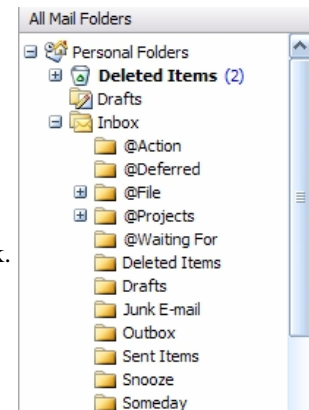


Figure 3 GTD Outlook Add-in Folders

The GTD Outlook Add-in works with both the Tasks and Calendar portions of Outlook. If you select an email from within the Inbox and then click on any of the Toolbar keys (Delegate, Defer, Action, etc.) you'll begin to see how GTD works with the digital trusted source Inbox. Figure 4 shows what happens when Action is clicked. A pop-up window appears where you can select the type of Action from a drop-down menu. In this case, I used @Agendas. You can also assign it to a specific project. When you click on OK it automatically opens a new task window as seen in Figure 5. Once saved, the new task is in Outlook's task list and is categorized by @Agendas. The email is removed from the Inbox.

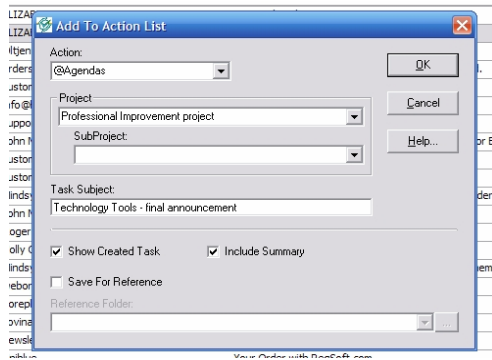


Figure 4 Add to Action List Pop-up

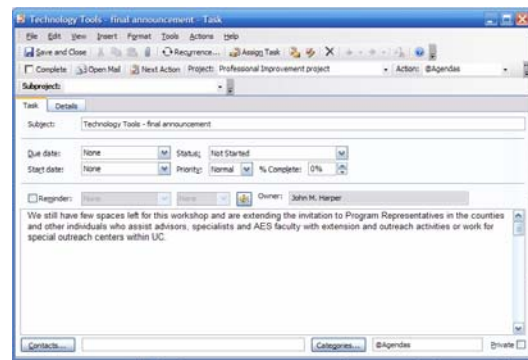


Figure 5 New Task Window

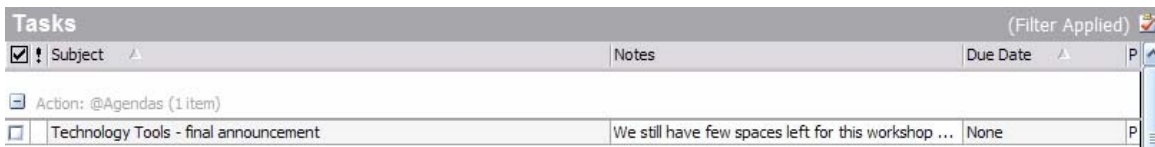


Figure 6 Outlook's Task List with GTD Action Items

Figure 6 shows Outlook's task list with the @Agendas category.

Clicking on the other Toolbar options work similarly but they may use Outlook's Calendar or other features. I find the GTD Outlook add-in a great time saver. I hope you'll think so too.



Contact Information

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