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FUNDAMENTALS
MASTERING WORKFLOW SERIES: LEVEL 1

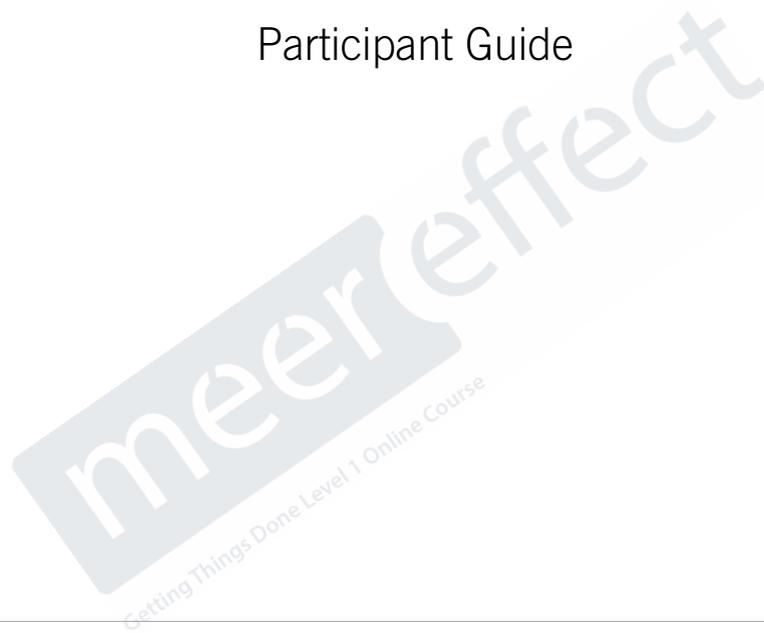GTD Participant guide

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FUNDAMENTALS

MASTERING WORKFLOW SERIES: LEVEL 1

Participant Guide

DATE

NAME

CONTACT INFORMATION

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SELF-ASSESSMENT

Before you start learning and applying GTD, it will be useful for you to assess how you are managing things in your world. When you are rating the following items, consider both your professional and your personal life. In both settings, you want to get stuff done. In both areas, you will want to have perspective and control. Rate each of the following statements using the scale provided.

RATING SCALE

1 = Strongly Disagree
2 = Disagree
3 = Neither Agree or Disagree
4 = Agree
5 = Strongly Agree

_____ 1. I write down ideas and to-do items when they first show up.

_____ 2. I keep a complete list of all my next actions.

_____ 3. I keep a record of what I am waiting for from other people.

_____ 4. My calendar contains only appointments and day specific information that I need.

_____ 5. I have a single list of all my current projects.

_____ 6. I have at least one recorded next action for each of my projects.

_____ 7. I get my email inbox to zero every day or so by going through each one and putting it where it belongs.

_____ 8. I can file and access reference material easily when needed, whether it is paper or digital.

_____ 9. I have designated in-trays in all the places I need to capture all my incoming paper and stuff.

_____ 10. I get my paper in-tray(s) to empty every day or so.

_____ 11. When I get behind or overwhelmed, I know how to get back on track by engaging with my next actions, projects, and calendar.

_____ 12. I take time each week to get caught up and to review how I am doing with my professional/personal work.

_____ 13. I have a trusted place I can easily find and look at to see additional/support information about any project I am working on.

_____ 14. I have a framework I can use in order to best choose what to work on at any particular time.

_____ 15. When unexpected demands arise or interruptions occur, I can easily evaluate their priorities against everything else I have to do.

Total your score = _____ / 75

SCORING KEY

15 – 30   You really need this course! Don't worry we'll walk you through it.

31 – 46   You are getting a glimpse of what it feels like to live a productive life.

47 – 62   You are doing good. Keep going!

63 – 75   You are close to being masterful with GTD! This last fine tuning will make a huge impact for you.

PRODUCTIVE EXPERIENCE

| **MY UNPRODUCTIVE EXPERIENCE** | **MY PRODUCTIVE EXPERIENCE** |
| I call it | I call it |

| **OUT OF CONTROL** | **IN CONTROL** |
| Looks like | Looks like |

| **STRESSED** | **RELAXED** |
| Feels like | Feels like |

| **DISTRACTED** | **FOCUSED** |
| My thinking is | My thinking is |

| **REACTIVE** | **MEANINGFULLY ENGAGED** |
| My creative energy is | My creative energy is |

| **COST** | **VALUE** |
| To me | To me |

| **COST** | **VALUE** |
| To those around me | To those around me |
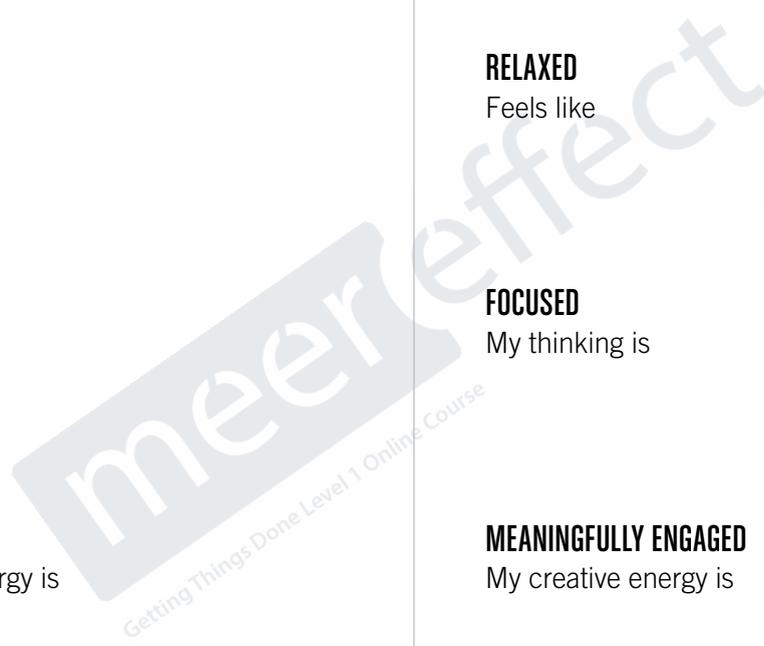
DESIRED OUTCOMES

INCOMPLETION TRIGGER LIST

WHAT HAS YOUR ATTENTION?

PROFESSIONAL

PROJECTS started, not completed

**PROJECTS** that need to be started

"LOOK INTO" projects

COMMITMENTS/PROMISES TO OTHERS

COMMUNICATIONS TO MAKE/GET

WRITING TO FINISH/SUBMIT

READ/REVIEW

FINANCIAL

PLANNING/ORGANIZING

ORGANIZATION DEVELOPMENT

MARKETING/PROMOTION

ADMINISTRATION

STAFF/PARTNERS

SYSTEMS

SALES

MEETINGS

WAITING FOR

PROFESSIONAL DEVELOPMENT

WARDROBE

PERSONAL

PROJECTS started, not completed

PROJECTS that need to be started

PROJECTS I have with other organizations

"LOOK INTO" projects

COMMITMENTS/PROMISES TO OTHERS

COMMUNICATIONS TO MAKE/GET

UPCOMING EVENTS

ADMINISTRATION

LEISURE

FINANCIAL

PETS

LEGAL

WAITING FOR

FAMILY

HOME/HOUSEHOLD

HEALTH

PERSONAL DEVELOPMENT

TRANSPORTATION

CLOTHES

ERRANDS

COMMUNITY

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MIND SWEEP

MIND SWEEP
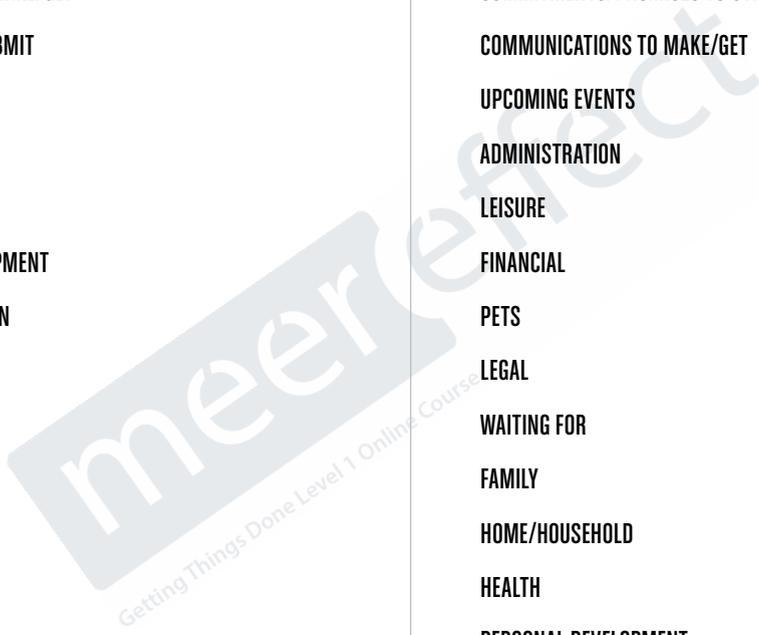
CAPTURE TOOLS - TODAY

- [ ] Personal email
- [ ] Professional email
- [ ] Social media
    - [ ] _____
    - [ ] _____
    - [ ] _____
- [ ] My mind
- [ ] Paper in-tray/container
- [ ] Home
- [ ] Office
- [ ] Notepads
- [ ] Messages/texts
    - [ ] Phone
    - [ ] Computer
    - [ ] _____
    - [ ] _____
- [ ] Voice notes
- [ ] Flat Surfaces
    - [ ] _____
    - [ ] _____
    - [ ] _____
- [ ] Refrigerator door
- [ ] Desk drawers
- [ ] Wallet

- [ ] Backpack
- [ ] Purse
- [ ] Briefcase
- [ ] Digital images/photos
    - [ ] Camera
    - [ ] _____
- [ ] Shelves
- [ ] Whiteboard
- [ ] Corkboard
- [ ] Chalkboard
- [ ] Computer desktop
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

CAPTURE TOOLS – FUTURE

- ☐ Personal email
- ☐ Professional email
- ☐ Social media
  - ☐ _____
  - ☐ _____
  - ☐ _____
- ☐ My mind
- ☐ Paper in-tray/container
- ☐ Home
- ☐ Office
- ☐ Notepads
- ☐ Messages/texts
  - ☐ Phone
  - ☐ Computer
  - ☐ _____
  - ☐ _____
- ☐ Voice notes
- ☐ Flat Surfaces
  - ☐ _____
  - ☐ _____
  - ☐ _____
- ☐ Refrigerator door
- ☐ Desk drawers
- ☐ Wallet

- ☐ Backpack
- ☐ Purse
- ☐ Briefcase
- ☐ Digital images/photos
  - ☐ Camera
  - ☐ _____
- ☐ Shelves
- ☐ Whiteboard
- ☐ Corkboard
- ☐ Chalkboard
- ☐ Computer desktop
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ Portable In-tray/folder/envelope
- ☐ Portable note pad

CLARIFY MAP QUESTIONS

1. What is it? _____

2. Is it actionable? ___ Yes   ___ No

3. If **NO**, what should you do with it?
   ☐ Trash
   ☐ Store as reference
   ☐ Incubate

4. If **YES**, what's the next action? _____
   ☐ Do now, if less than 2 minutes
   ☐ Delegate to someone else
   ☐ Defer to do myself later

5. If there are more steps to do, what is the project title? (This should clearly describe the final desired outcome.)

   _____

MINDSWEEP EXAMPLE 1

1. "Board meeting"
2. YES
3. n/a
4. Email Roger re sales forecast
5. Present sales team projections at board meeting

MINDSWEEP EXAMPLE 2

1. "Holiday"
2. YES
3. n/a
4. Search online for accommodation in London
5. Summer holiday in London finalized

CLARIFY MAP

CLARIFYING MIND SWEEP ITEMS

1. What is it? _____

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   - ☐ Trash
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   - ☐ Incubate

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· ·

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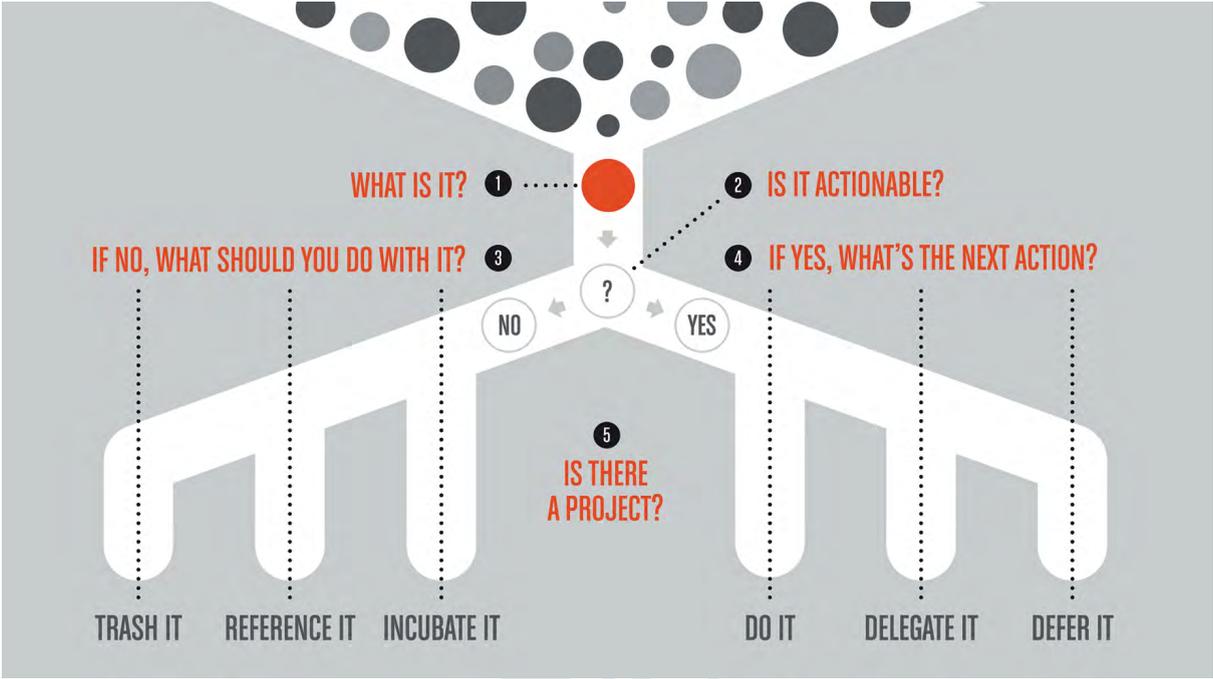
    _____

· ·

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    _____

PROJECTS

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

PROJECTS SUPPORT NOTES

PROJECT | **PROJECT**

PROJECT | **PROJECT**

NEXT ACTIONS LIST

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

NEXT ACTIONS LISTS

CALLS	AT COMPUTER

NEXT ACTIONS LISTS

AT OFFICE

AT HOME

ERRANDS

ANYWHERE

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NEXT ACTIONS LISTS

AGENDA FOR

_____

AGENDA FOR

_____

AGENDA FOR

_____

AGENDA FOR

_____

NEXT ACTIONS LISTS

(OTHER)

(OTHER)

WAITING FOR LIST

CALENDAR ITEMS

17

SOMEDAY/MAYBES

GTD WEEKLY REVIEW®

GET CLEAR

☐ **COLLECT LOOSE PAPERS AND MATERIALS**
Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

☐ **GET "IN" TO ZERO**
Process completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

☐ **EMPTY YOUR HEAD**
Put in writing and process any uncaptured new projects, action items, waiting fors, someday/maybes, etc.

GET CURRENT

☐ **REVIEW NEXT ACTIONS LISTS**
Mark off completed actions. Review for reminders of further action steps to record.

☐ **REVIEW PREVIOUS CALENDAR DATA**
Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

☐ **REVIEW UPCOMING CALENDAR**
Review upcoming calendar events—long and short term. Capture actions triggered.

☐ **REVIEW WAITING FOR LIST**
Record appropriate actions for any needed follow-up. Check off received ones.

☐ **REVIEW PROJECT (AND LARGER OUTCOME) LISTS**
Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current next action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting fors, etc.

☐ **REVIEW ANY RELEVANT CHECKLISTS**
Use as a trigger for any new actions.

GET CREATIVE

☐ **REVIEW SOMEDAY/MAYBE LIST**
Review for any projects or actions which may now have become active, and transfer to the appropriate list. Delete items no longer of interest.

☐ **BE CREATIVE & COURAGEOUS**
Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system?

REFLECTION

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NOTES

NOTES

PROJECT AND NEXT ACTION VERBS

PROJECT VERBS = Desired outcome requiring more than one action step to complete

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

NEXT ACTION VERBS = Very next physical, visible step required to finish something or move something toward closure

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

Examples:

PROJECT/DESIRED OUTCOME What's the larger result desired? How will you know when it is done?	NEXT ACTION What do you need to do that? Do you have everything you need?
Research relationship w/ J. Smith, Inc.	Draft proposal ideas for alliance
Implement new fiscal year budget	Email Bill for copy of last year's budget
	Call Susan to catch up
Get new car	Research Web sources - cars
Hire marketing director	Talk to Sean re: job description

CLARIFYING AND ORGANIZING YOUR "STUFF"

A FEW EXAMPLES:

AGENDAS

Bob-new client software
Bob-update on EC timing
Julia-hiring new accountant
Khaled-vacation dates

COMPUTER

Review monthly projections
Draft budget
Email Andrea re: dept reorg
Order new towels at
   towels.com

PROJECTS

Install new dept org chart
Submit new sales budget
Finalize Hawaii trip
R&D new office printer

CALLS

Travel Agent-Hawaii tickets
Ben 617-888-2122 re: update
Janet re: Dad's health
Pat re: dinner invitation

HOME

Set up new book shelves
   in Sarah's room
Work compost into garden
Set up new accounting
   software
Repair bathroom light

MIND SWEEP

~~Staffing situation~~
~~Get Hawaii tickets~~
~~Pat~~
~~Open 3 regional offices~~
Summer visit of in-laws
home office setup

SOMEDAY MAYBE

Vacation in Caribbean
Open 3 regional offices
Trip with the kids to Yosemite
Jasmine planted on arbors
Get voice recognition
   software

ANYWHERE

Draft ideas re staff party
Review Hines proposal

OFFICE

Draft contract for Smith
Reconcile expenses
Draft outline for new sales
   program
Copy article for staff

WAITING FOR

Jim 9/17- comps on new
   workbook
Jim 9/21 - updated invoice
Mario 10/16 reschedule sale
WS 8/6 - software order

ERRANDS

Pick up photos at lab
Pick up clothes at Cleaners
Drop off pants at tailor
Buy New dog collar at
   pet store

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