

# Implementation Guide

## for the Getting Things Done® Methodology



David Allen Company

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This Implementation Guide is designed to assist you to implement the techniques and ideas that make up the Getting Things Done® methodology. The prerequisite to using this Implementation Guide is for you to understand the core GTD® methodology for mastering the art of relaxed and controlled workflow. You can learn the GTD methodology or refresh your skills by:

- Reading David Allen's best selling book *Getting Things Done: The Art of Stress-Free Productivity*
- Listening to the *Getting Things Done* Audio CDs that are available through our store at: [www.davidco.com](http://www.davidco.com)
- Attending an open to the public seminar, see the dates and cities at: [www.davidco.com](http://www.davidco.com)
- Contacting us to learn more about our coaching services at: [www.davidco.com](http://www.davidco.com)

Once you understand the GTD thought process and the terms that David uses in his books then you will be ready to use this Implementation Guide. Some of you may also decide to join GTD Connect®, our online learning center, to support yourself as you continue to learn more about GTD methodology. GTD Connect is mentioned throughout this Implementation Guide when there are additional resources to increase your knowledge.

- First the Implementation Guide will walk you through a step-by-step process to gather the tools you need, set aside some time, and get started with this program.
- Then, the Implementation Guide provides clear directions and best practices in each of the five phases of the Mastering Workflow process. With each phase, you'll be given a time estimate so that you can plan accordingly, a list of any required supplies or tools, and a checklist of steps to keep track of your progress.
- Also in this Implementation Guide, you'll get handy tips and guidelines for ensuring success as well as articles on Getting Email Under Control and Setting up a General Reference Filing System.

Remember that you don't need any new skills to be more productive, and you probably don't need to get a lot of new tools. What you might want, however, is a guide to step you through the process and provide some encouragement along the way. That's what this Implementation Guide is intended to be.

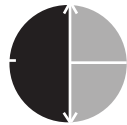
We wish you the best on your journey toward getting more done with greater ease and enjoyment!

## Setting Up the Time, Space, and Tools

*To get started, block off some time, set up a work area, and get some basic tools. You should also set up your general reference filing system.*

### Time Needed

3-6 hours



### Steps

- |   |  |
|---|--|
| 1 | Set aside a block of time to implement the initial Collecting process. |
| 2 | Get the basic supplies you will need.                                  |
| 3 | Set up your work area with the furniture and equipment you will need.  |
| 4 | Set up your general reference filing system.                           |

*The beginning is half  
of every action.*

*—Greek proverb*

## Step 1: Set Aside a Block of Time

Time Needed	15 minutes
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*Schedule some time to prepare a workstation with the right tools and implement the initial Collecting process (described in “Collecting”).*

- ☐ Schedule 2 to 3 hours to complete the Collecting process.
- ☐ Set aside 2 whole days, back to back, if you want to complete the Collecting and Processing phases at the same time. Try to schedule one block of time, rather than several chunks. This will give you a huge sense of control and accomplishment.
- ☐ At a minimum, start with a 2-hour block of time.

### *Tips: Setting Aside Time*

- *Keep in mind that collecting everything can take up to three hours. Processing and deciding on actions for every one of these items can take another eight hours.*
- *Remember that you'll most likely only need to do this once to catch up on your backlog (depending on the volume.) Once your system is set up, you'll be in maintenance mode.*
- *You might not want to use “after hours” for this work. You could have reduced energy and enthusiasm at the end of the day.*

## Step 2: Get the Supplies You Need

**Time Needed** 1/2 hour (or 2 hours if you need to shop)

*You'll need some basic supplies to get the most out of Getting Things Done.*

### Basic Supplies

Get these basic tools and supplies:

- ☐ Paper-holding trays (at least three)
- ☐ A stack of plain letter-size paper
- ☐ A pen or pencil
- ☐ Post-it® Notes (3x3s)
- ☐ Paper clips
- ☐ Binder clips
- ☐ A stapler and staples
- ☐ Scotch tape
- ☐ Rubber bands
- ☐ An automatic labeler
- ☐ File folders
- ☐ A calendar
- ☐ A wastebasket and recycling bins

### “In-tray” Collection Tools

Get the tools you need to serve as versions of an in-tray:

- ☐ Physical in-tray (plastic, wood, leather, or wire tray for collecting paper-based materials and anything else physical that needs processing)
- ☐ Paper-based note-taking devices (notepads, spiral binders, index cards, sticky notes, etc.)
- ☐ Electronic note-taking devices (computer, personal digital assistant [PDA], etc.)
- ☐ Voice-recording devices (voicemail system, dictating equipment)
- ☐ Email

*Tip: Setting Up Your Organizer*

*Visit [gtdconnect.com](http://gtdconnect.com) for information on setting up different kinds of organizing systems.*

## Step 3: Set Up Your Work Area

Time Needed	0-2 hours
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*You need a physical location to serve as your basic work area. If you have work stations both at home and at work, you'll want to establish identical systems in both places. Here are the basic components for your work area. Select those you need, given the type of work you do.*

- ☐ Get a dedicated workspace and make sure you have sufficient writing surface.
- ☐ Get an in-tray.

You may also need:

- ☐ A phone
- ☐ A computer
- ☐ Stacking trays
- ☐ File drawers
- ☐ Bookshelves
- ☐ If you travel extensively, set up a mobile "office in transit." This can be a briefcase or bag with folders and portable supplies.

### *Tip: Setting Up Your Workspace*

*Don't share your work area with family members or work colleagues.*



## Step 4: Set Up Your General Reference Filing System

Time Needed	2 hours
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- ☐ You will need a set of file drawers. Purchase new ones if you need to. Get high-quality mechanics. This is not the place to skimp on quality.
- ☐ Create a single alphabetical filing system, not multiple systems based on various themes.
- ☐ As you process your in-tray, create new folders as needed to file nonactionable reference material.
- ☐ Take the time to clean out your existing reference files. Purge unwanted material, replace worn folders, divide bulging files into two or three smaller files, etc.
- ☐ Create typeset labels for your folders using your labeler.
- ☐ Keep your drawers no more than 3/4 full to allow for easy access.
- ☐ Avoid cumbersome hanging files and plastic tabbed labels if possible—it must be quick and easy to make a new file.
- ☐ Refer to the Articles section in the back of this workbook for guidance on setting up a general reference filing system.

### *Tips: Setting Up Your Filing System*

- *Keep general reference files at arms' reach.*
- *Have lots of fresh folders at hand.*
- *Avoid the unnecessary complication of color-coding your files.*
- *Label your files with an automatic labeler. This is faster for one-off labels than printing from your PC.*
- *Get comfortable filing even a single piece of paper that you might want to refer to later.*