

Mastering Workflow Series: Level One

Fundamentals Course

Overview

This one-day seminar delivers a dynamic, systematic, five-phase approach to dealing effectively with the incoming “stuff” of our lives—mail, meeting requests, email, ideas, notes, to-do's, projects, reference materials, etc., and provides a practical methodology for utilizing paper-based and computer-based systems to organize it.

Our ability to focus effectively on the job and priorities at hand is too often challenged by the non-stop flood of required, but not necessarily urgent, input, decisions and actions with which we must deal. The Fundamentals Course teaches a thought process which participants immediately apply to current work at hand, creating critical enhancements and seamless integration of their own unique personal management systems.

Upon completion, participants experience an increased sense of relaxed, focused control. Projects, action steps, and supportive information are clarified and organized in a streamlined, workable context. Key issues such as “personal vs. professional,” staff communications, email overwhelm, filing, reading material, and project support, are addressed.

Any and all types of paper-based and computer-based tools can be used, with emphasis on the customization of a practical, leakproof personal system for the individual. Participants gain much greater understanding of how to best coordinate the different types of tools available and maintain a continuously improving, flexible approach.

Course Outline

1. Introduction

Transmuting “Stuff” to Outcomes and Actions

2. Collecting

The “Mind Sweep”
Using Collection Tools

3. Processing

The Fundamental Process
Outcomes and Actions

4. Organizing

Using Personal Management Tools
Fundamental and Expanded Systems
Total Workflow Integration

5. Reviewing

The Critical Success Factor

6. Doing

Eliminating Procrastination
Criteria for Choosing Action

For more information

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About the Course

This is a very tactically oriented, hands-on seminar teaching individuals how to get a GTD[®] system up and running. Your staff will learn the fundamental thinking process to make clear decisions and learn the five phases of workflow mastery. This one-day presentation is packed with practical recommendations and suggestions about how to put GTD to work — at work, at home and in everything they do.

The Course Focuses On:

- Managing workflow seamlessly through GTD's five phase model of Collect, Process, Organize, Review, and Do
- Making clear decisions on input
- Creating a draft GTD system for managing projects and actions
- Getting email to zero on a regular basis
- Organizing projects and related actions
- Efficiently dealing with filing
- Overcoming procrastination
- Prioritizing

Course Benefits

Direct experience with the models to begin application —through hands-on exercises, group discussions, and facilitator demonstrations. Participants will leave the course with a first draft system populated to continue implementation on their own.

Participant Materials Include

- Detailed workbook, with information and examples on all of the concepts presented in the course
- Jumpstart Guide to use as a starter system for tracking projects and actions
- GTD System Guides, which are laminated cards of the key GTD models covered in the course
- The *Getting Things Done: The Art of Stress-Free Productivity* book

Learning Objectives

After completing this seminar, participants will be able to:

- Describe key principles and concepts of the GTD methodology
- Describe the five phases of Mastering Workflow
- Explain the thought process for clarifying outcomes, projects, and next actions
- Identify and take the immediate next actions necessary to implement the GTD methodology for immediate benefit

Prerequisites

None. Ideal for those new or experienced with GTD.

About Us

David Allen Company is a global training and consulting company, widely considered the leading authority in the fields of organizational and personal productivity.

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Overtime... All the Time

— by David Allen

Caught in the busy trap.

Recently while coaching a leader, I discovered another level of the busy trap—the syndrome: “If I can just do something that feels like I’m working with focus, I don’t have to deal with the angst about all the other stuff I should be doing.”

He had processed down to the last dozen or so emails—ones he wanted to keep in there because he needed to more than two minutes on each of the responses. He had already set up a category of tasks in Outlook called “At Computer.” Because I wanted him to stop using Inbox for a holding bin, and taste what it was like to get it empty, I nudged him to go ahead and move those emails out of the inbox and onto the “At Computer” list.

As he did that, you could see the light dawn. “Wow! Now I see all my work inventory in one place! And I now realize that I would let myself spend time on those emails before anything else, because that would seem the easiest choice to make. Now I can assess them immediately within the context of everything to do. They’re not lost, and they’re in proper perspective. I’ve been letting myself get sucked into the easiest being busy thing, instead of feeling better about better choices.”

Out of the busy trap.

Edit email subject lines when you store or reply or reroute. One moment of mental effort and movement on your part helps grease the processing skids for yourself and others later in assessing what this email is about, as it morphs into different things with different purposes.

Psychic RAM tends to bring to awareness items based on criteria of latest (most recent in time) and loudest (emotionally), which is hardly the most effective file-and-retrieval system. Similarly, if your system of action reminders is haphazard (post-its on the screen, phone slips on the desk, notes on your chair, people interruptions), your busy energy momentum will glom on to the easiest thing to maintain itself. But the most obviously in your face is not the best criterion for in-the-moment choices of what to do.

Stop. Do what you need to do to feel as good as you can about what you’re doing. You can never be busy enough to dispel the need to be busy. And when you choose the work you are doing, it’s a lot easier to choose not to work. “Everything should be made as simple as possible, but not simpler,” said Albert Einstein.

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The Productivity Investments

– by David Allen

We can all be more productive, as individuals and organizations. There is always value that can be added with only the resources at hand. But what increases productivity? Not more resources, as a rule. More money that produces the same result per dollar spent is no improvement. What generates more for the energy invested is the conscious insertion of at least one of four things that don't happen by themselves: clearing, focusing, structuring, and action.

(1) Cleaning and clearing. Any activity that does not handle its own waste appropriately is going to increase drag on the system and cause unnecessary effort to endure and deal with accumulated residue. What's not needed any more? Old projects, outworn policies and procedures, old un-renegotiated commitments, hung up body toxins - anything taking up space and attention and not creating value, when removed, will increase flow and output automatically. But it takes intention and action to eliminate stuff - it becomes more and more inert if it isn't consistently infused with conscious interest.

(2) Focusing. Psychic and physical forces are automatically mobilized with a focus and rapidly dispersed and exhausted without one. What's the purpose...for this meeting, this proposal, this vacation, this department, this desk, this job? What are we trying to do? Where are we going? Clear answers to these questions create energy which produces results with less effort. But it takes focus to direct a focus. Unattended, distraction creeps in like a thief in the night.

(3) Structuring. Look around at the physical structures you see right now. They exist not as value in themselves but for what they create – comfort, protection, support, communication, focus, visibility – with minimal energy expended. With no structures we would have a heck of a time maintaining those experiences with just our own bodies. With no list of all our errands at hand when we're out and about, we're likely not as productive as we could be. If no one is designated to answer the phone, everyone has to waste attention on it when it rings. If my paint brushes are not in order, I'm limiting my creative expression. Structures don't show up by themselves. Productive people are always asking: How can I better organize and streamline what I'm doing?

(4) Action. It's easier to move when you are already in motion. It takes less effort to redirect something going in the wrong direction than to get something going from a standing start. Fear of the unknown and of potential negative consequences of imperfection can easily create the analysis paralysis. If something needs to be different than it is and there is no "next action" decided yet, there will tend to be debilitating angst as well as zero motion. Initiating a simple next physical step is often the key to releasing stored energy and generating productive momentum. But it requires a concentration of intention to hold the mind steady toward a pinpoint of action.

Any one of these four dynamics can improve the quality and quantity of your outputs, but each requires a conscious effort to employ. And any one of them, underemployed, can undermine it. You could have a clean, focused, active department that lacked good job descriptions, and it won't be as effective as it could be. A team could be well structured, working overtime, with clean in-baskets, and still not be focused on what they needed to do appropriately. And you could have a hard-charging goal-oriented, organized executive with tons of incomplete communications and commitments weighing him down like an albatross.

A person in sustainable high performance keeps a focus on what's important, captures and organizes all the open loops still relevant to their life and work, and consistently takes action on expressing and completing that which is theirs to do. If you're not operating from that place as much as you'd like, which of these productivity-relevant areas is your weak suit right now? Which might be the improvement opportunity for your organization, or for your family? Are things as clean, focused, structured, and active as they could or need to be in all meaningful areas? What would be a good investment strategy?

A useful definition of liberty is obtained only by seeking the principle of liberty in the main business of human life, that is to say, in the process by which men educate their responses and learn to control their environment. - Walter Lippman

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Time Management - What's the Real Issue? – by David Allen

You can't manage time. Time just is. You don't mismanage five minutes and wind up with four, or six. So what is this thing that has been mislabeled for so many years, and why did it get an inappropriate name? Time management is really managing what we do, during time. But it's easier for executives to say that time is what needs to be managed, rather than themselves. It's easier to make time the enemy and parade our worthiness (I have so many big, important things to get done), rather than to say "I don't keep my agreements."

Time management is really agreement management. At the end of the day, how good you feel about what you did (and what you didn't do) is proportional to how well you think you kept agreements with yourself. Did you do what you told yourself to do? Did you accomplish what you think should have been accomplished? Wasting time only means that you think you should have been doing something other than what you were doing. Sleep is not a waste of time if you think you need it. Taking a walk instead of rewriting your strategic plan is not a waste of time as long as you think taking a walk is the thing to do at that moment. It's when you wind up not having done that which you've agreed with yourself should be done that the trouble begins.

A trait of sophisticated executive leadership is the ability to take risks. Because a healthy sense of self is required to take those risks, as you graduate in levels of responsibility it becomes increasingly important that you trust yourself. One of the greatest saboteurs of that self-trust is broken agreements. Obviously if those agreements are not kept with others – staff, customers, stakeholders – the ability to garner their support is automatically diminished. But the real victim of commitments unfulfilled is you. Nothing takes the wind out of your sails more than not keeping your agreements with yourself.

Most executives probably consider themselves relatively trustworthy. But commitment management is way more complex, subtle, and challenging than most people realize. In order to really be in the clear, you must first know what all your agreements are – and there are very few people who have them all defined and contained.

The most basic agreement is to show up at a designated location at a specific time (appointment). The most subtle and sophisticated agreement is to be doing what you think you should be doing with your life (are you fulfilling your purpose, living according to your values?) And there are all kinds of agreements lying in-between. Most executives have between forty and one hundred projects, a "project" being defined as something they want to finish that requires more than one action step (get a new car, hire an assistant, take the family skiing, launch the new product line, restructure their board, get a new set of golf clubs, etc.) Those projects are driven by ten to fifteen key areas of responsibility in their job (strategic planning, asset management, staff development, liaison with the board, etc.) and in their life (health, relationships, career, money, etc.) Add to that the responsibility of defining and communicating the vision of the company and formulating and executing both the long- and short-term strategies to get there. Moreover you can't really do any of those things – they represent outcomes and final results. The next needed physical actions (allocation of personal resources) required to execute on all of those commitments – emails to send, phone calls to make, conversations to have, documents to draft, proposals to read – number often in the hundreds.

All of these agreements must be incorporated into the commonly touted best practice of “setting priorities.” And if any one of those multiple horizons of “work” has not been adequately captured, clarified, organized and reviewed, there will be to some degree a lack of trust in your own behavior.

Because this huge self-management challenge was obscured and oversimplified with the concept of “time management,” the training, methods and tools for dealing with it have been woefully inadequate. If time were the only beast to be tamed, a clock and a diary (and some efficiency) were all you really needed. Handling commitments was relegated to a simple little best practice – have a daily to-do list. But that hasn’t really worked since the telephone, and to reduce the management of the complexity of the world within which we operate at multiple levels of focus and responsibility down to a simple “ABC” categorization of a simple list for the day creates more frustration than freedom.

The real best practices of self-management for high-performing professionals now need to include a thorough capturing and clarifying of all commitments – little, big, personal and professional – into a seamless system. And in addition to the obvious high-level outcomes that must be defined and reviewed (purpose, values, vision, goals, strategies) there must be an equal rigor with deciding and tracking the much larger number of projects and actions required to get things done – all with appropriate boundaries to ensure a sustainable balance in life and work. The degree to which you feel good about what you’re doing is equal to the degree that you know what you’re not doing, and have made that OK. That’s enough of an executive challenge. It’s time to put time management behind us.

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About GTD®

GTD is the shorthand brand for “Getting Things Done®,” the groundbreaking work-life management system by David Allen that provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD is a powerful method to manage commitments, information, and communication. It is the result of thirty years of consulting services, private coaching, training, and organizational programs with millions of people internationally. It has earned a reputation as the gold standard in personal and organizational productivity.

GTD enables greater performance, capacity, and innovation. It alleviates the feeling of overwhelm, instilling focus, clarity, and confidence.

Step by step you will learn how to:

- Capture anything and everything that has your attention and concern
- Define actionable things into concrete next steps and successful outcomes
- Organize information in the most streamlined way, in appropriate categories, based on how and when you need to access it
- Keep current and “ahead of the game” with appropriately frequent reviews
- Keep track of the bigger picture while managing the small details
- Make trusted choices about what to do in any given moment

Decades of in the field research and practice of GTD led to the publishing of the international best-seller *Getting Things Done*. Published in over 28 languages, *TIME* magazine heralded it as “the defining self-help business book of its time.”

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