

3 Key Objectives of the GTD Method

(1) **Capturing** all the things that might need to get done - now, later or someday - in a trusted system outside your head.

(2) **Directing** yourself to make front-end decisions about all of the inputs you let into your life so that you always have a workable inventory of "next actions" that you can implement or renegotiate.

(3) **Curating & Coordinating** all that content so you can understand the multiple levels of commitments you have to yourself & others at any point in time.

GTD = Getting Things Done

Capture

What do I capture? as soon as you attach "should", "need to", "ought to" or "I'm going to" to an item it is an open project you need to capture.

Tools Physical In-Tray, Paper-based Note-taking or Digital/Audio Note-Taking. Whatever works for you.

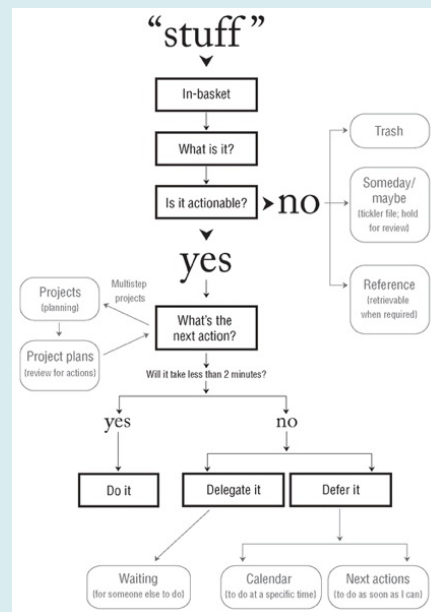
Success Factors For Capturing

(1) Every open item must be in your capture system & out of your head.

(2) You must have as few tools/buckets for capturing as you can get by with.

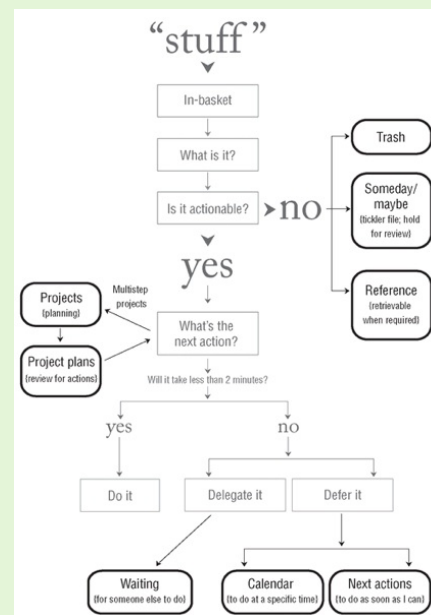
(3) You must empty your capture buckets often.

Workflow Diagram - Capture & Clarify



The bold portions of the workflow are where you implement the 1st & 2nd stages (Capturing & Clarifying) of David Allen's five-step GTD method.

Work Flow Diagram - Organizing



The bold portions of the workflow are where you implement the 3rd stage (Organizing) of David Allen's five-step GTD method.



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Page 1 of 5.

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Engage

Three Models for Making Action Choices

- (1) The Four-Criteria Model for Choosing Actions in the Moment
- (2) The Threefold Model for Identifying Daily Work
- (3) The Six-Level Big Picture Model

The Threefold Model for Identifying Daily Work

When you are engaged in getting things done, there are 1 of 3 actions you will be engaged in...

- (1) **Doing Predefined Work** Knocking off items from your Calendar or Next Actions list.
- (2) **Doing Work as it Shows Up** In the real world things come up that are unforeseen or unsuspected. You'll either choose to handle that work as it occurs or add it to your queue to be done later.
- (3) **Defining Your Work** Clarifying any new open items you've picked up, determining the next actions required & organizing yourself as necessary.

The Four-Criteria Model

Choosing Actions from Moment to Moment

The first three describe constraints within which you continually operate

- (1) **Context** You are always constrained by where you are & what resources you currently have available. These factors limit your choices with respect to what you can do at any particular moment.
- (2) **Time Available** When do you have to do something & how much time do you currently have available?

The Four-Criteria Model (cont)

- (3) **Energy Available** How much energy do you have? Do you currently have the mental or physical energy required for the action you are considering to take on at this moment?
- (4) **Priority** Given your context, time & energy available, what action remaining of your options will give you the highest payoff?

How To Plan

The Natural Planning Model

- (1) Defining Purpose & Principles
- (2) Outcome Visioning
- (3) Brainstorming
- (4) Organizing
- (5) Identifying Next Actions

Defining Purpose & Principles

Determining *The Why*...

- Defines success
- Creates decision-making criteria
- Gathers/Aligns resources
- Clarifies focus
- Provides motivation
- Enhances one's ability to envision the possibilities within the context of a well defined purpose
- Enables one to generate ideas about the all the possible options that may be available



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Outcome Visioning

Envisioning The What ...

Primary Question What will this project or situation really be like when it successfully appears in the world? In other words, clarify your intended outcome.

Visualizing is Required

We need to constantly define (& redefine) what we're trying to accomplish on many different levels, & consistently reallocate resources toward getting these tasks complete.

We often have to do this with limited available information or experience in the area we wish to succeed. This means we often need to make it up in our mind (**visualize**) before we can make it happen in our life.

Five Steps of Mastering Workflow

(1) **Capture** all "stuff" that has your attention.

(2) **Clarify** what each item means & what to do about it.

(3) **Organize** the results.

(4) **Reflect** on the contents consistently enough to keep them functional & up-to-date.

(5) **Engage** in the actions you've clarified & organized for yourself.

Guided Exercise to Get Started

(1) **Write Down** the project, situation or problem most on your mind at this moment.

(2) **Describe** in a single sentence your intended successful outcome for this project, situation or problem.

(3) **Finally** write down the very next physical action required to move the situation forward.

Clarifying Process

(1) **What is it?** At this stage you are starting to transform all the items you captured into a clear inventory of actions, projects & usable info by first determining what the hell you captured in the first place.

(2) **Is is actionable?** In other words, can you do something about it now or in the immediate future?

If No *either*...

- Trash it
- Save it to be reviewed later
- or Save it if it is needed as a reference for a later date

If Yes *determine what action is required next then*..

- Do it
- Delegate it
- or Defer it

Organizing

For non-actionable items have the following...

- Trash bin (sometimes all you'll need to do is just forget about it).
- A Someday/Maybe list with reminders to review content at a later date
- A place to keep reference material that is not associated to a particular project (i.e. Evernote, Web browser bookmarks or physical notepad).

For actionable items have the following...

- A Project list
- A place to keep reference material for open projects
- Next Actions list
- A Waiting For list for delegated items
- A Calendar for action items that have due dates & times specified



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Page 3 of 5.

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Organizing the Calendar

3 things go on your calendar

- (1) **Time-specific actions** i.e. appointments, meetings or anything you have set out a specific day & time for.
- (2) **Day-specific actions** an action that needs to be done on a certain day, but not necessarily at a specific time.
- (3) **Day-specific Info** Information that you want to be aware of on a specific date, but that may not require any action from you (i.e. a reminder it is someone's birthday or someone is returning from vacation).

Reflect - The Weekly Review

Review your lists & calendar weekly to accomplish the following...

- Gathering & Processing all your open items
- Review your system (adapt &/ tweak if necessary)
- Update your lists
- Get clean, clear, current & complete

The Six-Level Big Picture Model

This model is best used to assess your overall big picture priorities. This helps inform what you are doing day-to-day, month-to-month & year-to-year.

Let's Start from the Bottom Up

Ground: Current Actions The accumulated list of the actions you need to take.

Horizon 1: Current Projects Generates most of the actions that you currently have in front of you.

The Six-Level Big Picture Model (cont)

Horizon 2: Areas of Focus & Accountabilities You create or accept projects & actions because of the roles, interests & accountabilities you have (i.e. your commitments to your family, health, spiritual practice, career ambitions, personal finances, recreation etc.).

Horizon 3: Goals What you want to be experiencing in the various areas of your life 1 to 2 years from now defines your areas of focus, inform the projects you take on & determines the actions you engage in from moment-to-moment.

Horizon 4: Vision Projecting 3 to 5 years into the future. Thinking about your long-term quality-of-life, family, financial & career aspirations. Considering external worldly events or trends that could impact the aspirations you are pursuing (i.e. globalization, market trends, climate change, technological breakthroughs etc.).

Horizon 5: Purpose & Principles The big picture. What really matters to you, no matter what? What have you determined your primary purpose to be in life (this will change & evolve over time)? What are the values & standards that you have chosen to live by.

Brainstorming

Determining *The How* ...*

Basic Principles of Brainstorming *What not to do during this stage...*

- Don't Judge, challenge, evaluate, or criticize
- Don't go for quality, go for quantity
- Don't make analyzing & organizing your primary focus, have it in the background



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Organizing

Key Steps

- **Identify significant pieces**

- **Sort by (one or more):**

~ Components (i.e. logistics, people & location)

~ Priorities (i.e. What are the critical pieces?)

~ Sequences (i.e. In what order would things need to be done?)

- **Detail to the required degree**

Determine Next Steps

Decide on next actions for each of the moving parts.



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