

GTD® and Paper Planners/Organizers – by David Allen

Many people have asked for our suggestions about setting up a paper planner or paper organizer.

An advantage to paper-based system is the capability of a better and faster visual overview and context. And even though the separate paper lists could be kept anywhere in a binder, it is nice to group them based upon how they are accessed.

You could put together your own paper system with products from an office supply store for about \$25 (most of that cost is for the binder.) You can pay much more for classy graphics and covers and accessories, but it is not required. The only preprinted forms you might need would be calendar pages and telephone/address pages. Otherwise, you could easily get by with plain lined notebook paper, on which you could make your lists.

Size is more a matter of aesthetics and logistics. Letter-sized notebooks have the advantage of holding standard paper that can be printed or copied, and finding inexpensive forms and accessories in standard stationery stores. Mid-sized planners have the advantage of convenience of writing in places of more limited space and slightly less bulky for carrying around.

The Basics of GTD®

Maximum benefit from your paper planner will be derived when you hold to the key principles for Getting Things Done®:

1. Get everything that has your attention out of your head and capture it in a trusted place.
2. Decide and track reminders of the very next physical, visible action required to move all your commitments to completion.
3. Define and keep track of all the more-than-one-step commitments you have.
4. Consistently update and review your total inventory of commitments in order to trust your choices about what you are doing.

The Power of Sophisticated Simplicity

Many years of research have proven that the systems and tools for personal productivity that have the greatest value are relatively simple. Too many lines and boxes on organizing forms, for instance, are not only unnecessary—they create more pressure than they relieve. If you have to think too much, every time you engage with the tool, it won't serve you.

Too much structure will produce constraint instead of freedom. For practicality and ease of use, we suggest you use paper with simple formatting—lined or blank paper will be sufficient to allow for greatest flexibility. The simple formatting will serve to facilitate capturing, clarifying, organizing, and reviewing with as little effort as possible.

At the same time, if your system is too simple, it will create too much complexity and confusion, because it will try to compress too many things together that should be kept separate and discrete. Having only a calendar and single to-do list (the typical “system” of many people) is much too basic to control the volume and complexity of commitments you probably have. You just need simple lists, but you'll need to have more than one.

By following our suggestions for using your paper planner/organizer, you'll discover the power of simplicity, married to a smart system design that can support a huge range of life-and work-styles.

The Basics of Using a GTD® Paper Planner/Organizer

This is a powerful tool that can have a profound effect on your productivity and peace of mind. Though the sections are relatively simple (with no complex structures to constrain you), there is an intelligent “flow” in how the sections function and work together.

The system is primarily a way to maintain a current and complete inventory of your commitments, in all of your involvements at many horizons. It easily facilitates capturing, clarifying, organizing, and reviewing all of the “stuff” in your mind and in your life, to ensure that you feel good about what you’re doing (and what you’re not doing!) at any moment.

Notes/In ... is a trusted place to freely capture input as it occurs, without having to analyse or organize it. It is the first section, because it can come into play instantly, anywhere.

The next most frequently accessed information will be the actions you need or want to take at any time. They are best organized in three sections (and most likely viewed in this order):

Calendar ... is the first place you'll look to know what has to be handled today, and how much time you'll have otherwise to deal with all the other things you have to do, which you'll see on your Action Lists.

Actions Lists ... which let you know all the single actions and next steps on your projects, to be done as soon as you can get to them.

Agendas ... hold all the reminders for items to discuss with people and in meetings.

When you are in control of all of the above, you will next want to connect and update all your actions by reviewing:

Projects/Goals ... which will remind you of the final outcomes you want to accomplish. For some of these, you will want more detailed...

Project Plans/Notes ... which will ensure greater comfort that you have all the right action steps needed to move things forward effectively.

And of course at any point in time, to get something done, you might want some information, which you can store in...

Reference/Miscellaneous Information ... and in **Contacts**

A paper system based on the GTD® methodology is structurally designed to avoid the ineffectiveness and pitfalls of other systems where important items get lost or fall through the cracks. Most other systems attempt to have one coordinating mechanism for all the entries about one topic. The reason this is ineffective is that in regards to one single project, you may have:

- Recent notes from a meeting about the project in Notes/In
- The next meeting about the project on your Calendar
- A phone call to make about it on a “Calls” list in Actions Lists
- Something to talk to your boss about in Agendas
- The project itself listed in a “Projects” list, in Projects/Goals
- A plan for the project in Project Plans/Notes
- A checklist for managing that kind of project in Reference/Miscellaneous Information

The alternative would be to organize all that data in one place, under the heading of the project. The problem would be, when you're at a phone, or meeting with your boss, you would have to look at all your project notes to find all your phone calls and all your "at-boss" agendas. The way this system is laid out has proven to be the most effective way to stay on top of all these relationships of topics, different locations, and contexts in which you find yourself.

The key will be to examine all the contents regularly and use the tool as a thinking and coordinating catalyst. The more complete the contents and the more consistently they are reviewed, the more you'll relax and produce results, almost automatically.

Suggested Sections for a GTD® Paper Planner/Organizer

Notes/In Section

This section serves as a wonderfully portable IN tray or collection box. Use it as your first entry place for anything you might need to capture and clarify later. Typical uses would be:

Voice mails – Better to listen to them once, take notes, and empty voice mail each time you access it.

Meeting notes – Grab anything you might want to do something about. You can also dedicate a separate page here for each meeting, so you can save your "raw" notes for later review if needed.

Random thoughts – It's always good to have plenty of room to capture thoughts and ideas that may have value, but which you don't want or need to decide about at the moment.

Conversations – Have this section open, ready to take notes as you're on the phone and when people "drop by" your desk.

The key to the power of this section is ensuring that you process and purge these notes regularly. That will build the trust necessary to allow these inputs to stay off your mind. Every day or two, make appropriate decisions about your notes, determine and capture actions and projects onto your other lists, and clean this section to "zero".

Calendar Section - Best Practices on Using a Calendar

The calendar should be used for three things:

1. **Appointments**
2. **Day-specific actions**
3. **Information for and about that day**

Appointments – Time-specific commitments, e.g. "2:00 pm meet with attorney." These are tracked on the calendar within the appointments area.

Day-specific actions – Things you have to do that day, though there is no specific time commitment, e.g. next Tuesday you need to "Call Margaret to confirm Wednesday meeting."

Information – What you need or want to know on that day, e.g. "Water turned off from 8-9am" or "Bruce returns from vacation."

What doesn't work for this section is trying to cram "daily to-do lists" onto your calendar. They too often don't match the reality of your day, and prevent you from seeing the whole picture of all possible actions that you could do to be productive at any moment in time. The calendar serves as a quick and critical reminder of the "hard landscape" – the immovable objects

in the day. When there is discretionary time, you can refer to your Action Lists in that section to assess all your options. Your Action Lists will actually contain the vast majority of your “to-do’s.”

If you still require a quick prioritization technique to keep track of the five or ten most important things to do in the next few days, use a note stuck on your calendar with that list, which you can move from day to day and edit easily.

Action Lists Section

This section is used for the lists of the very next actions you need to do, as soon as you have the time to do them. These include the next steps on projects (“Call Joe for his suggestions about a dentist”) and single actions we need or want to do (“E-mail Daniel our pics from Hawaii”).

Because most people have dozens of these kinds of “to-do’s”, it is easiest to manage them on separate lists, organized by the context required for the action. In other words, if you need to be at your computer to take the action, put the reminder on a “Computer” list. If the action requires going to the hardware store, park that on an “Errands” list.

The most common contexts for actions (and therefore the most useful ways to categorize action reminders) are:

- Calls (from any telephone)
- Computer (e-mails and documents to write, web surfing, etc.)
- Office (requires being there)
- Home (requires being at or around your house or apartment)
- Errands (out-and-about)
- Anywhere (can do the action in any location)
- Waiting For (projects and actions others are supposed to be doing, which you care about)
- Agendas (i.e. in meetings with others. This deserves its own section, to follow.)

Feel free to use or start with the above suggestions and customize as you wish. For instance, if you work from home, you won’t need a separate “Office” action list; or if you don’t travel with a computer, you might not have a separate “Computer” list, using “Office” and “Home” for computer actions in those locations.

(TIP: Use your “Errands” page of actions to hold separate sticky notes for the places you shop – e.g. hardware, grocery, office supply – with the running list of items to get from those locations.)

Important: Any actions that absolutely must be done on a specific day (e.g. a call that has to be made sometime on Tuesday) should be tracked on your calendar, not on these action lists. See our notes about use of the Calendar in that section. These Actions Lists are essentially reminders of things that need to get done as soon as you can, after you have dealt with the “have-to’s” for today. These lists are not re-written every day – they are simply available to remind you of all the things you need to do, when you have any discretionary time.

Agendas Section

Use this section to hold reminders of topics to cover the next time you have meetings or conversations with individuals or groups.

Set up a separate page for each of the people you interact with routinely (partner, assistant, boss, direct report, attorney, etc.). When you determine the next action on something is to “Talk to Jim about possible dates for the party,” if Jim is someone you communicate with regularly, have a page titled “Jim” to hold those items, to be handled when you and Jim meet or talk next. When you’re on the phone with him or in his office, you can then cover all the accumulated topics since the last meeting.

Also consider setting up pages to use in this way for people you may be interacting with for a limited time, such as a contractor working on your house, an attorney working on your estate plan, or the instructor for a class you're taking.

In the same way, set up pages for each of the regular or special meetings you have with staff, boards, or committees, collecting agendas to cover at those meetings.

Projects/Goals Section

Use this section for keeping lists of the larger than single-action things you need to keep track of, such as projects to complete, goals to accomplish, and ideal scenarios to envision.

An extremely important list to maintain is an inventory of all of your projects. Projects are any commitment that requires more than one step to complete, but which can be finished within weeks or months. The purpose of a "Projects" list is to keep track of all the things that are incomplete, reminding yourself about them, and continually clarifying the immediate next actions you need to put in your "action lists" section to complete until you can mark the project off as "done." Most people have between thirty and a hundred of such commitments.

Examples:

- Get new tires on the car.
- Extend our credit line at the bank.
- Finalize Tony's school logistics for the fall.
- Launch the new ad campaign.
- Research day care for Barbara.
- Hire a new assistant.
- Fix the basement heater.

Projects are not "next actions" but should be used to determine next actions, which can then be tracked in your Action Lists section. A weekly review of this "Projects" list, keeping it current and updating action reminders, is a key practice for stress-free productivity.

You may want to subdivide your Projects into more than one list (e.g. Personal, Job, Kids, Home); or simply keep one complete inventory for easy overview.

Someday Maybe

An important and very useful distinction to make in this section is to create a list of "someday maybe" projects. These are things you might want to do, sooner or later, but don't want to create a firm commitment right now to be taking action on them. They can range from recent projects that now need to be moved to a "back burner" until a more appropriate time (e.g. organize a staff picnic), to the more long-range ideas about things you might like to do some time in the future (learn Italian, climb Mt. Whitney, get your M.B.A.). Giving yourself permission to capture and review these kinds of creative possibilities, letting them incubate, and regularly evaluate them for possibly making them active. Most of the really great things you may be doing a few years from now will likely start on this list.

You may also want to use this section additionally to keep reminders of any larger goals and objectives. What do you want to accomplish in the next year? Three years? Five years? Customize your own lists which will help keep you focused on the bigger picture – personally and professionally.

Project Plans/Notes Section

This is a place to hold all your thoughts, details, plans, and miscellaneous support materials for your projects.

It would be useful to set up separate pages for each of your projects for which you want to capture ideas. Even if you don't have many ideas yet about, say, your next vacation, this would be the place to dedicate at least one page to capture any current thinking, as well as providing you a trigger or motivation to regularly focus on the project and develop it further.

Even simple projects, such as "Get new tires," might utilize a simple page for collecting your tire size, pricing, sources, etc. Much larger projects could have computer printouts or just additional brainstorming space for reminders and idea-holders.

Reference/Miscellaneous Information Section

This section is for all the various lists and reference materials that might be useful, interesting, and fun to have at hand.

It's perfect for organizing information you want to be able to refer to from time to time. It's great for maintaining checklists you will want to use for special kinds of projects and events. And, it's also a great place for those random pieces of information that you say "Where should I put this?"

For instance...

Reference

Birthdays and special dates, Clothing sizes for yourself and family, Favourite restaurants, Printed upcoming schedules for club activities, athletic and cultural events, Other family members' calendars, Instructions – software applications, voice mail codes, Etc.

Checklists

Household maintenance chores, End-of-month or end-of-year routines, Workout/exercise programs, Travel and special trip checklists (vacation, skiing, etc.), Etc.

Miscellaneous

Jokes, Sticky note parking lot (for temporary reference), Someday Maybe things to do, Etc.

Contacts Section

Use this section to capture information about people and places and to record important numbers. You may choose to record names, addresses and contact numbers in a strictly alphabetical manner, one letter per page. As an alternative, you may decide to separate your contacts between personal and business, or in any other configuration which makes sense to you.

For more David Allen Company tools and educational content, check out our GTD Products section at davidco.com.
For our online learning center, visit GTD Connect at gtdconnect.com.