



WUNDERLIST[®]

Setup Guide

TABLE OF CONTENTS

FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

1 FOCUS OF THIS GUIDE

UNDERSTANDING THE GTD[®] BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

2 WHAT IS GTD?

2 GTD'S FIVE PHASES OF MASTERING WORKFLOW

2 THREE STAGES TO INTEGRATING GTD

3 THE GTD WORKFLOW MAP

4 THE GTD WEEKLY REVIEW[®]

APPLYING GTD TO WUNDERLIST[®]

SETTING UP WUNDERLIST FOR GTD

PROJECTS AND NEXT ACTIONS

5 USING WUNDERLIST TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

5 THE MOST COMMON GTD LISTS

5 SETTING UP LISTS

7 EXPLANATION OF THE COMMON GTD LISTS

14 LINKING PROJECTS TO THEIR RELATED ACTIONS

16 MOVING ITEMS BETWEEN LISTS

17 THE WEEKLY REVIEW TIES IT ALL TOGETHER

17 CUSTOMIZING YOUR CONTEXTS

17 USING SUBTASKS

18 CREATING FOLDERS

18 USING WUNDERLIST INBOX

TABLE OF CONTENTS (CONTINUED)

APPLYING GTD TO WUNDERLIST (CONTINUED)

- 21 REVIEWING YOUR LISTS
- 21 USING DUE DATES, REMINDERS, AND STARRING
- 22 MARKING ITEMS COMPLETE
- 22 SORTING LISTS
- 23 USING SHORTCUT KEYS
- 23 SHARING FROM WUNDERLIST

EMAIL

- 26 INTEGRATING ACTIONABLE EMAIL WITH WUNDERLIST
- 26 TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL
- 27 WUNDERLIST FOR OUTLOOK[®]
- 29 GETTING YOUR INBOX TO ZERO

CALENDAR

- 30 WHAT BELONGS ON YOUR CALENDAR
- 31 SETTING UP A CALENDAR FEED
- 31 REVIEWING YOUR CALENDAR

REFERENCE

- 31 USING WUNDERLIST TO STORE REFERENCE INFORMATION

SYNCING

- 35 SYNCING WUNDERLIST

CONCLUSION

FINAL THOUGHTS AND NEXT STEPS

- 36 ADDITIONAL RESOURCES
-

FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Wunderlist[®] for your GTD[®] workflow. This Guide will focus on configuring and populating Wunderlist for your Project lists and plans, Next Actions lists, and Reference.

The instructions and screenshots show examples for the free version of Wunderlist on the Mac desktop. However, we found the interface between the Web, PC, and Mac versions so similar and beautifully consistent that we decided to create one Guide for simplicity for our users. But you may find some slight differences in the instructions from your version.

If you are new to Wunderlist, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity using the built-in features. If you already have an established system in Wunderlist, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

We are aware that there are many features and ways to configure your GTD system in Wunderlist. This is not a technical Guide, nor will it cover all the instructions for how to use Wunderlist. We'll leave that to the folks at Wunderlist to share with you through their excellent support material.

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Wunderlist. Even with your lists managed in Wunderlist, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like Wunderlist, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every available feature and add-on in Wunderlist. There may be more offered than you will ever need. Focus on what makes a difference for you.

OK...let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Wunderlist as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done[®] approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done”, the ground breaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE PHASES OF MASTERING WORKFLOW

- **Capture** Collect anything and everything that's grabbing your attention
- **Clarify** Define actionable things into concrete next steps and successful outcomes
- **Organize** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it
- **Reflect** Step back to review and update your system regularly
- **Engage** Make trusted choices about what to do in any given moment

THREE STAGES TO INTEGRATING GTD

1. UNDERSTANDING You understand the distinct differences in the five phases of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.

2. IMPLEMENTATION You have installed at least the basic gear to support a GTD system, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.

3. BEHAVIOR CHANGE The five phases of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on”.

This Guide will leap forward to the Implementation stage, by configuring Wunderlist as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹*Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers or at gettingthingsdone.com

APPLYING GTD TO WUNDERLIST[®]

PROJECTS AND NEXT ACTIONS

USING WUNDERLIST TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Wunderlist is an excellent option for managing the projects and next action lists in your GTD system. We recommend you create lists in Wunderlist to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

Here are the 10 lists that are a good starter set for most people:

- | | |
|-------------|-------------------|
| 1. Agendas | 6. Home |
| 2. Anywhere | 7. Office |
| 3. Calls | 8. Waiting For |
| 4. Computer | 9. Projects |
| 5. Errands | 10. Someday/Maybe |

Sorting your next actions by context (lists 1–7 above) is recommended, because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done.

SETTING UP LISTS

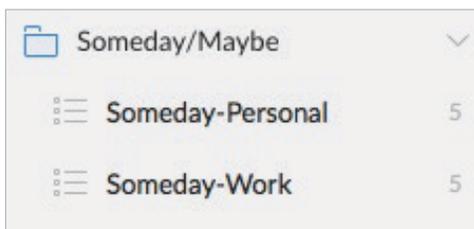
Let's set up the 10 suggested lists in a PC, Mac, or desktop browser version of Wunderlist now. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

You may find it easier to do this initial setup on your desktop version of Wunderlist and not your mobile device.

1. Press the  icon found on the bottom of the left panel of Wunderlist (or use the keyboard shortcut ⌘ + L on Mac or Ctrl + Shift + L on Windows or Web versions)

CREATING FOLDERS

Another handy feature of Wunderlist is creating folders for your lists. This can be helpful to group lists of a similar nature or topic. For example, if you create multiple Someday/Maybe lists, you could group them in a folder in your left navigation panel. To create a folder, drag one list and drop it into another. You'll also find Create a Folder under the Edit menu. The option to create a folder will automatically appear, with the two stacked folders in your new folder.



Grouping lists in folders will be even more useful with reference lists, which we describe later in the Guide. The advantage of stacking lists in folders is being able to group similar lists, being able to “hide” lists you don’t use as often, and having a shorter list of lists to look through in your left panel. The disadvantage is potentially over complicating your structure and having to expand the folders before being able to drag and drop an entry into it.

USING THE WUNDERLIST INBOX

The Wunderlist Inbox can be used to hold Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly, not know exactly what the next action is yet, but you don’t want to lose the idea. Or, you may see something on the web you want to get back to and add it into the Inbox using the Add to Wunderlist extension. Sending items to the Inbox stores the idea until you are ready to clarify it (through the questions on the GTD Workflow Map shown on page 3 of this Guide) to decide what it means and what you want to do about it.

Inbox comes already built into Wunderlist as a default list.



The difference with the Inbox versus your other lists is that these items are unprocessed. You still have not clarified yet what the item is or what you want to do about it. To make the Inbox work, you’ll need to treat items you create there with the same rigor you would your email and paper Inboxes, meaning, process the items in this list down to zero on a regular basis. There are 3 methods for capturing Inbox items.

USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Wunderlist offers many shortcut keys for common functions in the app. Shortcuts will vary by platform, so check out the shortcuts for your version of Wunderlist under

Account Settings or Preferences. You can even customize them. Here is a short list of the most common ones:

WINDOWS AND WEB

Add a New To-do: Ctrl + N

Add a New List: Ctrl + Shift + L

Star Selected To-dos: Ctrl + S

Search: Ctrl + F

Email List or To-do: Ctrl + E

MAC

Quick Add (even when Wunderlist is not open!) & Search: Ctrl + Option + W

Add a New To-do: ⌘ + N

Add a New List: ⌘ + L

Search: ⌘ + F

Email List or To-do: ⌘ + E

SHARING FROM WUNDERLIST

Wunderlist isn't just for managing your own workflow, you can also use it for collaborating with friends, family, and coworkers.

Here are some practical uses for sharing:

- Collaborating with colleagues on a work project
- Collaborating with family or friends on a personal project
- Sharing meeting notes with your team
- Sending an errands list to your partner/spouse/roommates
- Sending your boss your current Projects list
- Sending your Agenda list to someone before you meet with them

EMAIL

INTEGRATING ACTIONABLE EMAIL WITH WUNDERLIST

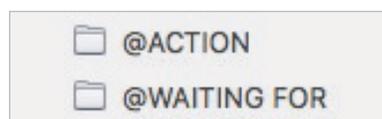
The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the Weekly Review). The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in "in" as the safest place.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE: USE THE EMAIL AS THE REMINDER

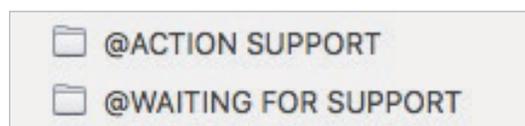
Create @Action and @Waiting For folders in your email program, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in Wunderlist—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and Calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about emails you've already processed, if the next action is not apparent by the subject line.

OPTION TWO: USE NEXT ACTIONS LISTS IN WUNDERLIST OR YOUR CALENDAR AS THE ACTION REMINDER

Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your Calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your Calendar or Next Actions lists. It's one fewer place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.



REFERENCE

USING WUNDERLIST TO STORE REFERENCE INFORMATION

Wunderlist can manage a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your Next Actions lists.

This functionality is so totally open-ended and in one sense, so simple, the possibilities are infinite.

Have you ever...

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

Here are some possible new reference lists to try:

- Checklists
- Areas of focus
- Higher Horizons of Focus³
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

³See the *Getting Things Done* book, *Making It All Work* book, or our GTD Methodology Guides for more detail on developing your Horizons of Focus.

CONCLUSION

We hope this instruction guide has been useful. It is intended as an adjunct to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, our public and on-site courses, individual coaching, and our online learning center GTD Connect[®].

Please visit our website to take advantage of the many support tools and services available to assist you in getting your GTD system up and running.

FOR TECHNICAL SUPPORT WITH WUNDERLIST, PLEASE VISIT:

wunderlist.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com

OR CONTACT US:

David Allen Company

+1-805-646-8432

customerservice@davidco.com