gtd®

IPHONE®

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD® system using the built-in applications on the iPhone®.

If you are new to the iPhone, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity using the built-in applications. If you already have an established system in the iPhone, 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 applications available that do similar functions. You do not need to use all of the built-in applications to be successful with GTD on the iPhone. By all means, experiment with the applications that will work best for you. For example, you may find there is a more robust reference application that you would prefer to use, such Microsoft OneNote® or Evernote®, instead of or in addition to the built-in iPhone Notes application. Or, you may find that the Reminders app for list management does not work as well for you as another one for your lists.

Whatever tools you choose, 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. 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 feature in your applications. There is likely far more built in than you will ever need. Focus on what makes a difference for you.

We should note that this Guide does not focus on all of the technical aspects of the iPhone and all of the options for syncing. Apple Support or your IT department will be your best resource for that.

The primary focus of this guide is about applying GTD to the applications available on your iPhone now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

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 your iPhone 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 groundbreaking work-life management system and bestselling book[1] by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS 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 steps 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 your GTD practice, 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 steps 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 apps in your iPhone 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.

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[1] *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback.

APPLYING GTD TO YOUR IPHONE®

PROJECTS AND NEXT ACTIONS

USING THE REMINDERS APPLICATION TO MANAGE PROJECT AND NEXT ACTION LISTS

The Reminders application is an excellent option for managing the lists in your GTD system. The Reminders application simply comes with one list named "Reminders." We recommend you customize the lists in Reminders to match the set of lists recommended in the *Getting Things Done* book, which we will describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

There are ten lists recommended in the *Getting Things Done* book that are a good starter set for most people.

Next Action Lists:

|	
1. Agendas	5. Errands
2. Anywhere	6. Home
3. Calls	7. Office
4. Computer	8. Waiting For

Incubation List:
9. Someday/Maybe

Outcomes List:
10. Projects

We recommend sorting your next actions by context (lists 1–8), 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 see (and have 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. We'll most commonly refer to these as "Next Actions."

Alternatively, you could group your next actions into one list called Next Actions, instead of sorting by context. Give the context-grouped lists a try if the concept is new to you. You might find it's surprisingly effective and easy to maintain.

When all of your old Reminders have been moved to your new lists, delete the Reminders list entirely. Do this by opening the list, tapping the three dots icon in the top-right corner of the list, and tap Delete List.
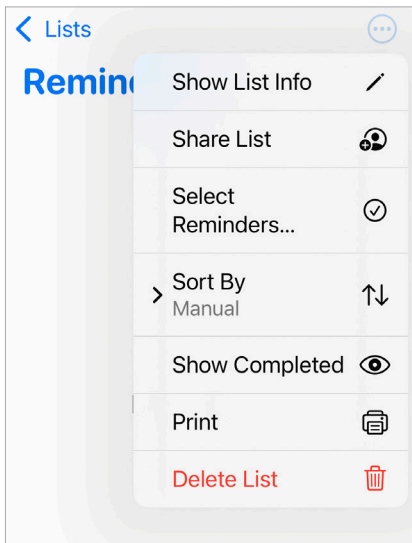

In the future, if you want to change the name of a list, tap the three dots icon, and tap Show List Info.

CREATING AN INBOX LIST IN REMINDERS

One additional list you may want to consider in Reminders is a list called Inbox. This kind of list can be used to capture 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. Assigning it to the Inbox list will store the idea until you ready to fully process it (through the questions on the GTD Workflow Map) to decide what it means and what you want to do about it.

To make this list work, you'll need to treat it with the same rigor you would your email and paper Inboxes. Meaning, process this list down to zero on a regular basis.

If you set up this list, we also recommend changing the setting for unassigned Reminders to this list. Go to Settings on your iPhone (not in Reminders) > Reminders > select Inbox list.
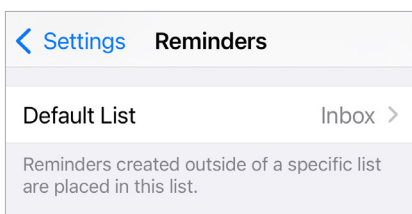
EMAIL

USING THE MAIL APPLICATION TO PROCESS AND ORGANIZE EMAIL

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

YOU HAVE TWO EASY OPTIONS FOR MANAGING ACTIONABLE EMAIL ON YOUR IPHONE

Option One: Use Reminders or your Calendar as the action reminder
Create @Action Support and @Waiting For Support folders in Mail 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.

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 fors, whereas the second option described below adds an additional location to look for a complete view of your reminders.

People often like this option because all of your reminders will be tracked in as few places as possible. But it does mean you have to take the time to go to Reminders and define the next action.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in Mail now.

Option Two: Use the email as the reminder Create @Action and @Waiting For folders, and use them like an action list. You would not also put those reminders on your Calendar or Next Action lists in Reminders—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 already decided about, if the next action is not apparent by the subject line.
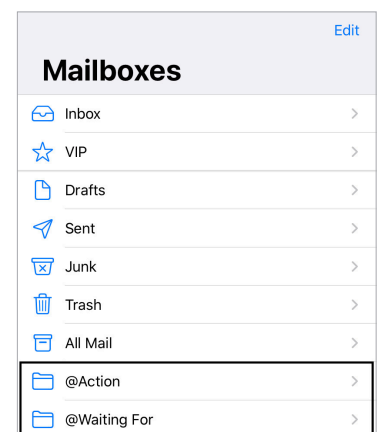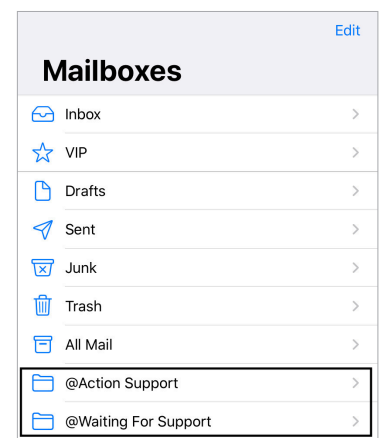
REFERENCE

USING THE NOTES APPLICATION TO STORE REFERENCE INFORMATION

The Notes application can manage an unlimited number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your action lists in Reminders.

This functionality of capturing reference 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 a place you traveled to?
- 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?
- wanted 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?

To get started, here are some possible categories and lists to play with:

- Checklists (e.g., GTD Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus®[4]
- 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

[4] See David Allen's *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement 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, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

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

FOR TECHNICAL SUPPORT WITH YOUR IPHONE AND THE BUILT-IN APPLICATIONS, PLEASE VISIT:

apple.com/support

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com