

Book Making It All Work

Winning at the Game of Work and Business of Life

David Allen
Viking, 2008
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Recommendation

David Allen’s bestseller *Getting Things Done* (GTD) taught readers how to gain “focus, control and perspective.” Simply put, this theory taught that if you organize your catalog of commitments and review it systematically, that process will relieve you of the stress and burden of having a chaotic to-do list constantly tugging at your consciousness. This positive self-management approach frees you to tap into your highest capabilities and experience true fulfillment. While the GTD method has attracted an international following, this follow-up doesn’t quite bring it to the next level. Although it is coherent, cohesive and accessible, it relies a good bit on repetition and rehashes a lot of the original work, particularly in the first two chapters, where Allen sells the system. However, for followers who can’t get enough of GTD, and for those who don’t know it yet and hope to get organized, *BooksInShort* recommends Allen’s latest read, particularly the chapters where he articulates the five stages of control and the “horizons of focus.”

Take-Aways

- Gain perspective by analyzing your “actions, projects, areas of responsibility, goals, vision, purpose and principles.”
- The “Getting Things Done” (GTD) system provides tools to help you focus.
- Having many things on your mind hinders your work and concentration.
- Decide how something affects you and what you need to do about it. Then process it through a system you trust.
- The “capturing” process identifies everything that needs your attention.
- Use the five stages of control and the “horizons of focus” to build your sense of perspective and “make it all work.”
- As you develop perspective, clarify every commitment in your “inventory” by asking yourself if it requires action.
- Once you know what things mean to you, organize them appropriately.
- Review and update your information periodically to align it with current reality.
- The “engaging” and “action” stages overlap; that is where you decide what to do.

Summary

“Getting Things Done”

When you feel as if you have a million things to do and all of them are crying out for your attention, focusing on any one idea is very hard. You feel stressed, overwhelmed and incompetent. The boiling, roiling mass of things on your mind makes it nearly impossible to focus and work efficiently.

“What people usually mean when they want to ‘get organized’ is that they need to get control of their physical and psychic environments.”

The Getting Things Done system (GTD) provides the tools you need to hone in and eliminate distractions. This organizational approach operates under the guiding belief that if you first decide how something affects you and what you need to do about it, then you can process it if you have the right system. Once you implement a system you trust, nothing should tug at your consciousness, because all of your to-do items will be lined up tidily. The GTD approach’s basic principle is, “With a complete and current inventory of all your commitments, organized and reviewed in a systematic way, you can focus clearly, view your world from optimal angles and make trusted choices about what to do (and not do) at any moment.” Using the GTD method according to a clear organizational structure will enable you to elevate your personal and professional life.

“Control and Perspective”

You need two organizational elements to “make it all work.” The first is control, which you achieve in five stages, and the second is perspective, which you gain by evaluating different focus points, or horizons. Being in control and gaining perspective has several positive results:

- Increased productivity.

- Reduced stress.
- Superior execution.
- Clearer communication.
- Enhanced creativity.
- A better work/life balance.

“If you don’t know why you exist or where you are going, any road, indeed, will do.”

The process of taking control, or getting organized, unfolds in five stages. Apply the first three stages – “capturing, clarifying and organizing” – to everything and anything that demands your attention. Then use stages four and five to “reflect” on your commitments and “engage” in specific actions that move you toward your objectives, as defined by your purpose and values. In detail, the five stages of control are:

First Stage of Control: “Capturing”

At any given moment, an abundance of things vie for your attention. The capturing process identifies everything that requires your consideration. Some elements in your life are on “cruise control,” that is, they are working just fine without needing your attention. For instance, your car is running well, the furnace is working and your child is happy with the new soccer coach. However, when something comes to the forefront of your consciousness, it causes an internal imbalance. For example, say your muffler starts making a funny noise, the room gets too hot or too cold, or the coach yells at your kid during a game. If something is on your mind, the first thing to do is to record it in some way.

“People are still desperate for some light at the end of the ‘overwhelmingly busy’ tunnel.”

Begin the capturing process with a “mind sweep,” a comprehensive search and capture of everything that demands your attention. Take an inventory of your surroundings. What is on or around your desk, in your briefcase, piled on top of your file cabinets and in the drawers? Next think of anything you’ve been working on or considering. Capture these things by writing them down, listing them on a whiteboard, stacking reminders in your in-box, sending yourself an e-mail or keeping a list on your computer.

“Your mind will remind you of all kinds of things when you can do nothing about them, and merely thinking about your concerns does not at all equate to making any progress on them.”

Once you’ve noted the obvious items, think of other things that tug at your consciousness. Use a series of perspective-setting “horizons” to focus your thinking. Start with projects – activities you can divide into action steps that lead to a clear conclusion. Do projects loom in the near future that you need to address, such as holiday shopping or finding an appropriate summer camp for your child? Then step back to broader concerns, like beginning an exercise regimen or reviewing your financial plan. From a higher horizon, consider your long-range plans. Try to envision how you engage with the world overall. A job change or death in the family might affect this vision. Finally, at the highest horizon define the principles you live by and your ultimate purpose.

Second Stage: “Clarifying”

The reason you underwent the mind sweep was to gather everything in your life that requires attention so that you can deal with it rather than have it gnaw away at your subconscious. Now what do you do with all of this “stuff?” Stuff is “everything in the giant in-basket of your work and life.” Physical stuff might include a miscellaneous collection of business cards, post-it notes, phone numbers hastily written on cocktail napkins, or articles you intend to read that are now at the bottom of the pile on your coffee table. Less tangible stuff could include unaddressed problems, unacknowledged aspirations, changing situations or daunting future projects.

“‘Making It All Work’ is about the work you have to do to know the work you have to do when the work you have to do doesn’t tell you the work you have to do.”

Now decide how to interact with all your stuff. Sifting and sorting allow you to create a relationship with the information you have captured. The goal is to clean out your in-baskets, both physical and mental. To clarify the way you’ll handle your stuff, you need to understand what each particular thing means to you. Once you have that understanding, organizing will come naturally. To define each item, determine if you can take action on it, that is, decide if you should do something about it – “yes” and “no.” If you decide that something doesn’t call for action, get rid of it, file it or decide to address it later.

“If you don’t pay attention to what has your attention, it will take more of your attention than it deserves.”

Next ask yourself to define the “desired outcome” of this process and to decide what your subsequent steps should be. These answers will enable you to transform ideas into projects you can act on and manage. Identifying the next step requires grounding your thoughts in reality. This demands time, energy and an alignment of resources. Previously unacknowledged or unidentified thoughts, feelings and concerns will come to the forefront.

Third Stage: “Organizing”

Now that you have decided what things mean to you, file each commitment, project or item in one of these six organizational categories:

1. **“Outcomes”** – Define your purpose to determine your goals. Write your operating “principles,” a “vision” statement declaring where you want to go in the long run, a list of a dozen or so umbrella objectives, a list of areas of focus (a life and work checklist of about 20 items), a list of current “projects” (30 to 100 items, as noted in the “10,000-foot” perspective below), and a list of pending matters awaiting action from other people.
2. **“Actions”** – This category includes your calendar and list of actions to take. The calendar is your most basic, useful organizational tool. It shows the “hard landscape” of your day, week, month and year. Use it to track your appointments, to-do items and time-specific activities. Your list of things to do as soon as possible fits in this category, and includes phone calls, e-mail, filing, errands and reviewing documents.
3. **“Incubating”** – This lists projects or ideas that you don’t want to act on now.

4. **“Support”** – This file holds materials that support your current projects.
5. **“Reference”** – This file holds background information relevant to your projects.
6. **“Trash”** – Establish a system for deleting, reviewing and reprioritizing your items. If you pack your system with out-of-date or gratuitous content, it will stop working.

Fourth Stage: “Reflect”

To experience the relief and freedom of having your activities, commitments and interests organized into a structured system, periodically review your information and update it to match the current reality of the various facets of your life. If you let your new system get bogged down with obsolete data, your outdated inventory will re-emerge to take up your time and energy again. Reviewing your system means continuously updating its contents and refreshing your outlook.

Fifth Stage: “Engaging/Actions”

Your ability to stay in control depends on how you assign your resources. At this stage, determine your next steps. You’ll know you are ready to act when you can answer three questions: What has to happen first? What does it look like? Where will it happen? Divide your “engagement factors” into three categories: “strategy, limiting factors and action options.” You can further divide the strategy category into “purpose/principles, vision, goals/objectives, areas of focus and responsibility, projects and actions,” using some of the information you’ve already assembled. The actions you take must be in harmony with your long-term goals, values and commitments.

“You can only feel good about what you’re not doing when you know what you’re not doing.”

“Context, time and energy” can inhibit your progress. Try to frame your actions in a context that gives you the necessary tools in the right locations. For instance, if you have a long plane ride, you could work on your laptop, but you can’t really make phone calls. Time is another limiting factor. You’ll need to decide how many hours each action needs and determine if you have that much time available. Last, consider your energy level. What are you physically able to accomplish?

The Horizons of Focus

During the action stage, two processes overlap: getting in control and gaining perspective. That’s where the “rubber hits the road,” and you can get to work. The farther you are from a commitment, the more clearly you can see it and plan for it. So after you go through the five stages of gaining control, use the following horizons of focus to build your sense of perspective and clarify your goals:

- **“Perspective at Ten Thousand Feet”** – The 10,000-foot perspective is a level higher than the action stage. The projects at this horizon have a timeline of one year or less. To administer the 10,000-foot horizon, list 30 to 100 projects you have under way. Review this list weekly, or more often if a project is falling behind or out of control. Conduct “get clear” reviews to process new information, clean out old data and organize your work. Use “get current” reviews to catch up on events since the last review. Then you’ll be able to do a “get creative” review, this will happen naturally when your mind is free of clutter.
- **“Perspective at Twenty Thousand Feet”** – At this horizon, ask yourself what projects you need to maintain in 10 to 15 “areas of focus.” For instance, at work you might be responsible for several different areas, such as product design, staff management or quality control. On a personal level, you may want to consider your health, finances or household needs. To handle these well, examine each increment or task. Ask yourself, “Why am I doing that?” To stay on top of your areas of focus, create a checklist that you can review monthly. It can include such items as a “job description, lifestyle checklist, organizational chart or project component checklist.”
- **“Perspective at Thirty Thousand Feet”** – At this level, your main question is, “What do I want to achieve?” Examples of 30,000-foot goals include sending your child to college, training for a marathon or introducing a new product. List these longer-range goals. Revisit this at least once a year. Reassess your goals if your environment changes or if you are having trouble bringing them to fruition.
- **“Perspective at Forty Thousand Feet”** – At the 40,000-foot horizon, consider your overall vision and focus on issues that have a multiyear impact, such as a career change or a household move. Visit this reality by asking yourself, “What do I want to be doing five years from now?” Businesses often review their vision statements in annual planning and strategizing meetings. However, life cycle events such as the birth of a child, marriage, divorce or death also can trigger the need to assess your reality from this perspective.
- **“Perspective at Fifty Thousand Feet”** – This perspective’s high altitude invites you to ponder life’s great questions: “What is my purpose?” “Why am I here?” This contemplation allows you to connect in a profound way with your true purpose and principles. This does not need to be a formal endeavor. However, if your internal compass is aimless, you won’t know which direction to travel to reach true fulfillment. When you explore things that are truly meaningful to you at your core, you gain an understanding of the wellspring of your values, ethics and ideals. This will create a resource that can guide you when you have to make difficult choices.

About the Author

David Allen is the author of the bestseller *Getting Things Done*. He is founder and president of a management, coaching and consulting group.
