## Goals For Our GTD Mastermind Group

Our group meets weekly online and we have specific goals we review on a recurring basis to see how everyone is doing and maintain accountability. Below, you'll find the goals we've created and implemented to date. Some goals have a link to a reference or 'trigger' list - which is a list of items, words, or phrases used to 'trigger' your mind to make sure you capture everything. In purple it mentions how often we review the goal and other special information.

The format for each goal is generally the same and is done in this format:

**Goal #X:** *–Where the "X" is filled in with the goal number*
[Description] *–Brief description of the goal we've all agreed on*

*Last Reviewed:* mm/dd/yy *–The date we last reviewed how our group is doing with this goal*
Next Review Date: mm/dd/yy *–The date we will next review how we're doing with this goal*

**Note:** mm = month, dd = day, yy = last two digits of the year

### Goal #1:

Everyone attends our group chats pretty consistently - at least two Sundays out of every month.

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This goal, unlike the others, is less about implementing and practicing GTD and more to make sure our group stays on track. Our group reviews this goal every four weeks – depending on how everything lines up in the calendar. For example, if we review how we're doing with this goal on Sunday, July 3rd our next review date would be on Sunday, August 3rd.

### Goal #2:

Everyone has their base system of tools setup at work and at home (or home if you work from home) in their work areas and any travel setups. (Link to list of tools: http://bit.ly/srGTDbts)

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement and maintain' goal. It includes a link to a list of the initial tools and items – based off books, guides, and GTD-related websites - you may want to use when implementing and practicing and ensures they are in the proper areas - e.g. filing folders by your desk. Our group's version of the document has a section listing each person and any tools they use that are not already on the list - e.g. X uses Asana, Y uses Trello. Reviewing this goal regularly makes sure that list is current. In times of change – new job, house, etc. – this makes it easier to get back up and running. Our group reviews this goal every four weeks.

**Goal #3:**

Implement reference filing system and keep it current during weekly reviews.

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

> **Note:** This is another 'implement and maintain' goal. First, we use it to make sure we've created our own reference filing systems – anything we may need to refer to at a later date, especially project files, in an A to Z naming format. Then, its purpose is to make sure we're continuing to use our filing system to keep things current, and make ourselves more productive and efficient. Our separate 'list' for this goal is not shareable as we only use the official guides (http://bit.ly/1lNlsRE) as needed. Our group reviews this every four weeks.

**Goal #4:**

Review and do a full purge of reference filing system

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

> **Note:** This is a 'maintain' goal. Let's face the facts – eventually you'll have files you don't need any more and goal #3 isn't really designed to catch that stuff. This goal has our group go through our reference system(s) and make sure we're only keeping on hand the stuff we really need and purging (or archiving) the rest. This keeps the system clean and easy to use and creates less friction in keeping current. Our group reviews this goal every six months. Our first big purge is scheduled for shortly after the deadline for filing personal tax returns as that will help us determine what we can/should store in separate archives for safekeeping.

**Goal #5:**

Physical Collection - Search your physical environment for anything that doesn't permanently belong where it is and put it into your in-tray regularly

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

> **Note:** This is an 'implement and maintain' goal. Initially we do one huge physical collection, but review this regularly to stay on top of things that can easily get overlooked if not put in a place we'll see regularly. Physical collecting has you 'corral' any physical item from your home, office, cars, etc. that isn't where it permanently belongs. This could be an item that:
> a) Is not in its 'home' – the measuring tape on the counter that belongs in the toolbox
> b) Should leave your home permanently – the box of stuff marked for donation, or
> c) Has an action item associated with it – e.g. the shirt that needs to get dry cleaned.
> Our group reviews this goal every four weeks.

**Goal #6:**
Digital Collection - Write/print out voicemails, to do lists, tame digital inboxes, corral unorganized digital files, etc. regularly (Link to Trigger List: http://bit.ly/srGTDdct)

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement and maintain' goal. Have you ever just selected all the files on your desktop and threw them in a folder? Then this is the goal for you! In this step you gather all the outstanding digital stuff that isn't where it belongs into one spot making it easier for you to go through everything. Once this pile in your digital inbox has been collected and processed then you have the tools to keep things maintained and current. For this goal our group has created a fairly extensive trigger list to help us go through the main areas where our digital lives reside – you have more places to keep collected and current than you'd normally think if you >really< want to be thorough. This has all the same rules and benefits of physical collection. Our group reviews this goal every four weeks.

**Goal #7:**
Mental Collection - Do a mind sweep regularly (Link to Trigger List: http://bit.ly/srGTDmst)

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement and maintain' goal. Besides collecting all your physical items and digital items into an inbox, there is also all the thoughts just running around in your head. The goal of doing a mental collection or 'brain dump' is to get all that stuff out of your head and not have to think the same thought over and over again until you finally deal with whatever your brain keeps shouting at you to do. So when going through a mind sweep you write out all the thoughts stored in your brain from the mundane items like 'Need to get some milk' to the less mundane items like 'If we were to add X feature to our software it might increase sales by 20%.' This can be very freeing for many people as they finally feel a bit of peace not having to try and keep a whole bunch of to dos in their head.

There is a list in the book and in other GTD-related resources that you can use to help 'trigger' your mind of things you need to remember to write down but you shouldn't just limit yourself to that list alone. Our group uses a base trigger list and then, like with the tools list, we each have our own spot at the bottom that is pertinent to us. So if someone is really active in an organization or has specific roles/large projects they always need to worry about they will list it in their section. This reminds them to make sure they are capturing all the outstanding things that have been nagging them about that area of their life. GTD practitioners will do mini-mind sweeps regularly but sometimes it helps to sit down and do one big mind sweep.

Our group will sometimes use our chats to do a full mind sweep where someone puts in the chat the first item, we all write down what we need, and then say done. We repeat that with each item until we're finished. This helps prevent us from going down the rabbit hole of trying to do stuff or think too much which can happen with solo brain dumps. Our group reviews this goal every three months.

Once goals 2-7 are done you enter the 'processing' phase of implementing and maintaining GTD. For our group we all have had lots of life changes that cause big disruptions or reduce the time (or energy) needed to implement GTD. To combat this, we started breaking down the next steps into sub-steps to make things easier to handle and keep our momentum going. Almost all of it follows closely with the book's outline but it gives each of us some flexibility moving forward.

Goal number 8 is the last goal all of has have made it to but below that I list off some of the other goals are group is working towards as some of us have done parts of this in the past. As we get farther along as a group and more definitively decide on those goals I'll update this document and post the new version on the site.

**Goal #8a**
First pass at reviewing initial collection piles:
1. Trash
2. Actionable now (by you, in two minutes or less)
   - Either just do the task or create the pile and do it based on our personal preference
3. All other items *–Reference, general filing, action items taking longer than two minutes, etc.*

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement' goal with a caveat. In general the point of having this larger goal (goal #8) broken down is to make things easier for when you first collect everything and your inbox is overflowing. This first pass helps you try and reduce that massive pile – especially by trashing stuff - into something more manageable and easier to complete the next two pieces which are all part of the normal 'processing' steps (see 8b and 8c). Although this violates the larger 'only handle something once' rule, a rule recommended for many reasons even outside of GTD, if you're finding your "inbox" is too much to handle then it can help to start here. The reason there is a caveat to this being an 'implement' only goal is because sometimes 'life happens' and it may feel like you need to almost start over – often resulting in another overflowing inbox. It is much better to try and quickly run through the first few steps and get caught up then go off the wagon completely or abandon this altogether and try and let current events drag you down. Some examples of circumstances that can cause huge disruptions to your life and make you push the restart or rewind button include:

★ Moving into a new place where your whole life gets packed up, then unpacked, and the 'home' that many objects had has to change based on new layouts and storage options.

★ Severe illness for you or a loved one means your normal schedule is screwed up and you find you have to forego doing a lot of 'non-essential' stuff and take on all the new 'critical' tasks.

★ You get a new job with new responsibilities, especially if you are being promoted and taking over someone's (often cluttered/messy) office and role and need to get re-oriented.

Our group reviews this goal every week or two during initial implementation and then only reviews it after that if one or more of us is having to get back in GTD-shape.

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**Goal #8b**

Second pass at reviewing initial collection piles:
1. Incubate (someday/maybe)
2. Reference (for filing)
3. Actionable Items (by you in more than two minutes or by other people), with next actions attached

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement' goal with the same caveat I mentioned in Goal 8a. In this goal the object is to take that pile of items from #3 of 8a and do a second pass. You will find items that are 1) for a project you may want to tackle later (someday/maybe), 2) not actionable but may be needed later (reference), or 3) related to a current project/commitment and should be done by you or someone else (actionable items). By taking care of the items for #1 and #2 we can further reduce our pile down to something that is full of actionable items and is not as overwhelming.

Normally during processing when you have an actionable item that's more than two minutes you put it through the whole processing system and get it into your 'trusted places' with your project lists updated and next actions curated. However, since this is during the initial implementation phase you may choose to just attach next actions – the very next physical action you can take - to each item. For example, with all physical items that's generally where I write the next action on a post-it note and stick it to the item in question. Even with pieces of mail it means I can tell the difference between what has been handled. Our group reviews this goal every week or two during initial implementation and then only reviews it after that if one or more of us is having to get back in GTD-shape.

**Goal #8c**

Everyone is processing their 'inboxes' regularly and sorting into delegate, defer, incubate, reference, and trash piles and doing all next action items that are 2 minutes or less.

*Last Reviewed:* mm/dd/yy
Next Review Date: mm/dd/yy

**Note:** This is an 'implement and maintain' goal. In this goal we're finishing the implementation part by getting everything properly organized into our personalized systems. We're then "maintaining" it because we are regularly doing all our collecting and capturing and have to process all that new stuff as well. When you're at this point you are doing goals 8a and 8b regularly but just adding the additional steps and doing it all at once. The key thing to remember is that when you're processing your inbox items you aren't actually DOING any of the actions unless they will take 2 minutes or less. Our group has created a processing reference list or 'cheat sheet' that's based off the book and guides but is not shareable due to some of its content like the workflow map. You can find the official workflow map in the GTD store (http://bit.ly/1lNlsRE). Our group reviews this goal every four weeks.

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## Additional Group Goals

Our group is preparing to work towards even more goals when implementing GTD, with some of us already having completed them as needed. Most of the next set of goals just continues to move us along the path to implementing and then maintaining the GTD methodology. However, we have some additional goals we'll reach that will be more about enhancing our systems and giving us the best chance to get and stay current.

Again, as our group progresses I'll update the document and post a new version on the website, but for now here are some of the concepts for goals we have for moving forward:

★ Keeping next actions and projects list up-to-date

★ Doing weekly reviews

★ Get 20,000 foot lists done and reviewed

★ Get 30,000 foot lists done and reviewed

★ Get 40,000 foot lists done and reviewed

★ Get 50,000 foot lists done and reviewed

★ Help everyone get their additional checklists and reference lists created

★ Help everyone get any additional items (e.g. Someday/Maybes, Agendas, Waiting Fors, etc.) done and reviewed