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GETTING THINGS DONE

Getting Things Done® Online
Group Discussion Guide

Contents

* Indicates pages containing group leader instruction not designed to share as a presentation slide

Instructions for Group Leaders

Welcome to Blended Learning Resources for group leaders. This program requires a nine- to eleven-hour time commitment for learners to complete. It consists of four group sessions (virtual or face-to-face) as well as individual assignments. But don't worry about teaching the course—the online training does that for you. As the group leader, your role is simply to create social learning opportunities in the group sessions. These will help deepen and reinforce what group members learn in the online training.

In this document, you'll find everything you need to manage the training from start to finish. Each group session outlined here includes four sections to help you prepare and lead discussions. The first section, Group Leader Notes, is just for you, but the other sections are presentation slides you can share in your group sessions.

Resouces in This Guide

1. **Group Leader Notes:** Explains how you can prepare for and lead the group session

2. **Review:** A short summary of what team members should have learned from their individual assignments
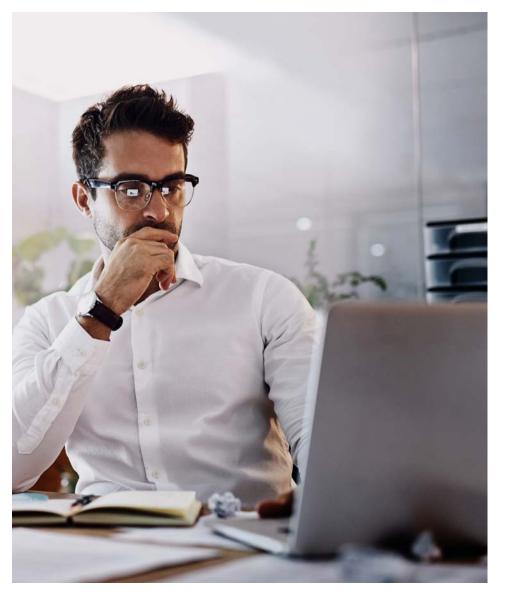
3. **Discuss & Apply:** Questions for you to ask and tips for application

4. **Next:** Overview of assignments learners should complete before your next group session

Presentation Slides

Two-Week Schedule

This program is designed to be completed over a two-week period, but you can adapt it to shorter or longer schedules as needed.

Week 1	
Mon	Group session 1 (see pp. 5–12)
Tue & Wed	Learners complete individual assignments
Thu	Group session 2 (see pp. 13–21)
Fri	Learners complete individual assignments

Week 2	
Mon	Group session 3 (see pp. 23–29)
Tue & Wed	Learners complete individual assignments
Thu	Group session 4 (see pp. 30–39)

Group Session 1

Group Leader Instructions

SESSION 1

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To get your group members excited about learning the Getting Things Done® (GTD®) skills, to clarify what the online learning journey looks like, and to explain what it will require

Prep Checklist

❏ Email calendar invites for all group sessions to learners.

❏ Make sure you have the registration link to the online training site (you should receive this from your senior client adviser when you order licenses for each learner).

❏ Review the presentation slides and decide which content you'll share and which questions you'll ask.

❏ Review the online course so you're prepared to demo it for your learners.

❏ Set clear expectations beforehand that your learners should attend each group session and complete all assignments.

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To get your group members excited about learning the Getting Things Done® (GTD®) skills, to clarify what the online learning journey looks like, and to explain what it will require

Review

- Since learners haven't completed any assignments to review, take five to ten minutes to define the goal of the course and review the lessons from the course. Consider speaking to these topics:

  - The reasons you're implementing this skill set now

  - Skills you see as especially applicable for the team/organization

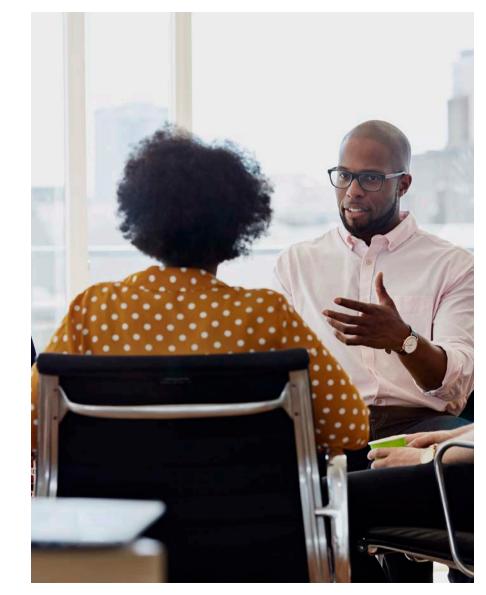### Discuss & Apply

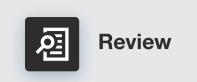Discuss the questions on the slide.

Next

- Provide the registration link for the online course and ask learners to register (registering is quick and easy).

- Share your screen and provide a brief tour of the online course, if necessary.

- Assign learners to complete online lessons 1–2 before the next group session (Introduction and Capture). The assignment should take 1–2 hours to complete.

Attention! Use the next page as the first slide of your Session 1 presentation.

Group Session 1

Presentation

Review

What Is Getting Things Done?

A set of skills to help you be more productive and less stressed

Review

Lesson Overview

1. **Capture:** Collect everything that owns a piece of your attention and direct items to a few chosen capture tools.

2. **Clarify:** Get your inbox to zero by deciding what your stuff means to you.

3. **Organize 1:** Utilize your calendar and lists in a way that works best for you.

4. **Organize 2:** Set up your system of lists and folders.

5. **Reflect & Engage:** Pause to reflect before you act so that you are focusing on the right priorities.

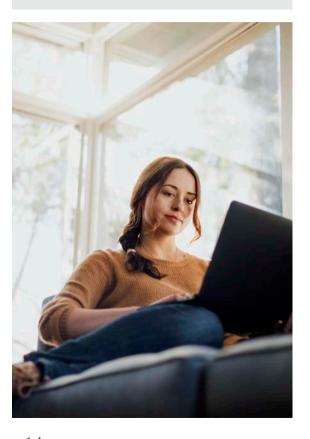6. **Renew through Review:** Review weekly to align your daily actions with longer term goals.

Discuss & Apply

What are your most urgent productivity challenges personally?

What are our most urgent productivity challenges as a team?

Next

- **Log in to the online course.**

- **Complete the following lessons before our next group session:**

  – Lesson 1: Introduction

  – Lesson 2: Capture

Group Session 2

Group Leader Instructions

SESSION 2

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignments (Introduction, Capture) and to discuss how and where they would apply those skills.

Prep Checklist

The day before the session:

❏ Send a reminder email to complete online lessons 1–2.

❏ Review the presentation slides and decide which content you'll share and which questions you'll ask.

❏ Group leaders with administrator access can log in at training.vitalsmarts.com to view learner activity reports, as well as observe what learners are saying by reading course discussion feeds.

SESSION 2

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignments (Introduction, Capture) and to discuss how and where they would apply those skills.

Review

The goal is to not reteach what they learned on their own. Instead, give a high-level summary of each lesson from the assignment. Ask a few people to share the insights or skills they found helpful.

Discuss & Apply

Discuss the questions on the slide.

Next

Assign learners to complete online lessons 3–5 before the next group session (Clarify, Organize 1, Organize 2). The assignment should take 2–2.5 hours to complete.
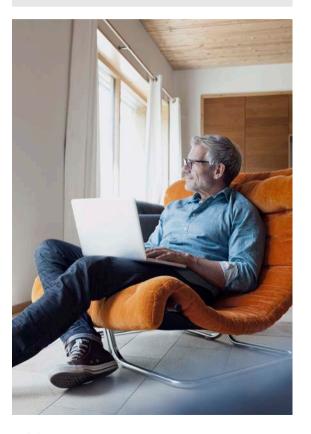
Attention! Use the next page as the first slide of your Session 2 presentation.

Group Session 2

Presentation

Review

Introduction

Achieving stress-free productivity is less about how much stuff you have to do or how much time you have; it's more about how you engage with all the stuff coming at you.

Capture

- **Capture EVERYTHING—in and out of your head.**
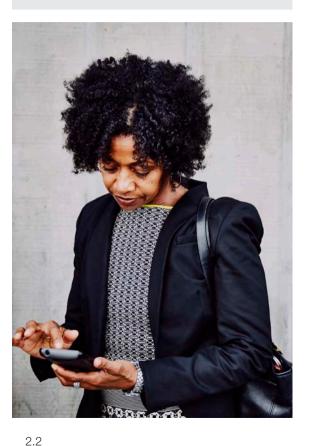- **Direct all your inputs to a few chosen capture tools.**

Review

Quick Tips

Tip #1: If you can't physically put something in an in tray when you're capturing, write a note on a piece of paper to represent it and put that paper in your physical in-tray. Or take a picture of the item and email it to your digital in-tray.

Tip #2: Make sure you have at least one capture tool with you all the time. You may have a thought regarding something you need to capture for work while you're roaming the grocery store aisles, and similarly, you may have a thought regarding something you want to pick up at the store during a work meeting.
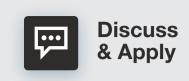
Review

Quick Tips

Tip #3: If you have multiple email inboxes, either close a few or automate them to forward messages to one inbox you trust you'll empty daily.

Tip #4: If you don't listen to your voicemail often but want to direct people to a capture tool you DO check often, simply change your voicemail message to say something like, "I don't check my voicemail very often, but I would be happy to help. The quickest way for me to get something is to email me at [insert your email address], and I will look at the email in the next twenty-four to forty-eight hours."

Discuss & Apply

Capture

• **What were your takeaways from doing a Mind Sweep?**

• **What capture tool(s) will you use going forward?**

• **How could we apply the idea of having a few key capture tools to the way we work or communicate as a team?**

Next

Complete the following lessons before our next group session

- Lesson 3: Clarify

- Lesson 4: Organize 1

- Lesson 5: Organize 2

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Group Session 3

Group Leader Instructions

SESSION 3

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignment (Clarify, Organize 1, Organize 2) and to discuss how and where they would apply those skills

Prep Checklist

The day before the session:

❏ Send a reminder email to complete online lessons 3–5.

❏ Review the presentation slides to decide which content you'll share, which questions you'll ask, and how you'll facilitate practice.

❏ Group leaders with administrator access can log in at training.vitalsmarts.com to view learner activity reports, as well as observe what learners are saying by reading course discussion feeds.

SESSION 3

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignment (Clarify, Organize 1, Organize 2) and to discuss how and where they would apply those skills

Review

The goal is to not reteach what they learned on their own. Instead, give a high-level summary of each lesson. Consider asking a few people to share the insights or skills they found helpful.

Discuss & Apply

Discuss the questions on the slide.

Next

Assign learners to complete online lessons 6 and 7 before the next group session (Reflect & Engage, Renew through Review). The assignment should take 2–3 hours to complete.
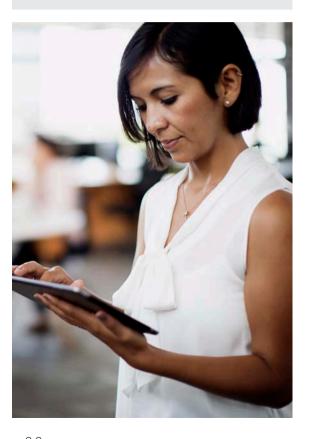
Attention! Use the next page as the first slide of your Session 3 presentation.

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Group Session 3
Presentation

Review

Clarify

- Decide what your stuff means to you.
- Identify next actions.

Organize

- Calendar only the firm and fixed.
- Group actions by context, not topic.
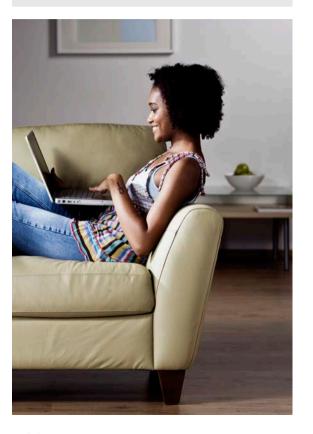- Park your tasks in a "system" of calendars and lists tools you trust.

Review

Quick Tips

Tip #1: It's fine to "decide not to decide" about something. You just need a decide-not-to-decide system to get the issue off your mind. This is the power of deliberately "incubating" items.

Tip #2: The Two-Minute Rule is golden. If something takes you two minutes or less, do it now! At two minutes, it takes longer to store and track an item than to deal with it the first time you see it—it's an efficiency threshold.

Tip #3: When you delegate an item—and you care whether something happens as a result—you'll need to keep track of it. It's important you record dates on everything you hand off to others—the date it was delegated and any due dates. Consider keeping a Waiting-For list for this purpose.
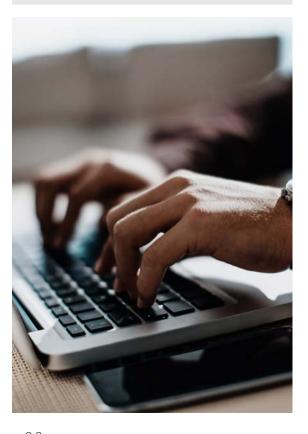
Review

Quick Tips

Tip #4: When you organize your Waiting-For items, list each one as follows: the name of the person you're waiting for, the item they promised to deliver, and the date (if any) they committed to deliver.

> *For example:*
> Mioko—email me first draft of the training schedule for next year—August 1

Tip #5: Adding to your Someday/Maybe list will help you feel good about what you're not currently doing. It acknowledges the value of the idea, gives it a safe home, and gets it off your mind. Whenever you do your Weekly Review, look for items to move to your Someday/Maybe list—some foreground frustrations that need to take a back seat for a while.

Discuss & Apply

Clarify

- **How can you apply this principle to help you process your email inbox more effectively and efficiently?**

Organize

- **How is the suggested approach for managing a calendar similar or different from your current approach?**

- **What are some helpful list categories you will use moving forward?**

- **Which list-management tool will you use? Why?**

Next

Complete the following lessons before our next group session:

– Lesson 6: Reflect & Engage

– Lesson 7: Renew through Review

Group Session 4

Group Leader Instructions

SESSION 4

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignment (Reflect & Engage, Renew through Review) and to discuss how and where they would apply those skills

Prep Checklist

The day before the session:

❑ Send a reminder email to complete online lessons 6–7.

❑ Review the presentation slides to decide which content you'll share, which questions you'll ask, and how you'll facilitate practice.

❑ Group leaders with administrator access can log in at training.vitalsmarts.com to view learner activity reports, as well as observe what learners are saying by reading course discussion feeds.

SESSION 4

Group Leader Notes

Session Length: 60 minutes
Prep Time: 15–20 minutes

Purpose

To make sure your learners completed their assignment (Reflect & Engage, Renew through Review) and to discuss how and where they would apply those skills

Review

The goal is to not reteach what they learned on their own. Instead, give a high-level summary of each lesson. Consider asking a few people to share the insights or skills they found helpful.

Discuss & Apply

Discuss the questions on the slide.

Next

- Explain how much time remains for learners to access the online content.

- Schedule ongoing learning by assigning specific lessons to review each week or month. Ask people to share their insights in weekly meetings.

- Set up an achievement board or an online "Ring the Bell" page where people can post successes and questions.

- Inform them they can access the after-training site, even after their online training access expires: vitalsmarts.com/gtd-training/gtd-coach.

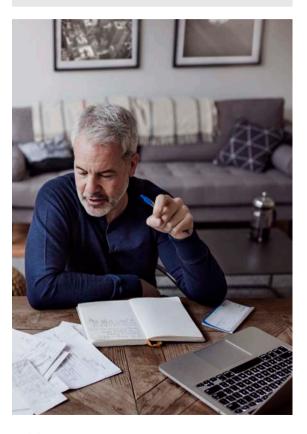**Attention!** Use the next page as the first slide of your Session 4 presentation.

Group Session 4

Presentation

Review

Reflect & Engage

Pause to reflect before you engage.

Renew through Review

- **Renew through a Weekly Review.**
- **Use GTD to align your actions with your values.**

Review

Quick Tips

Tip #1: When you're ready to engage with your day, first check your calendar (time-specific actions, day-specific actions, day-specific information) to get oriented. This will help you see how much "white space" you have to work with. Then you can fill that space with next actions. Once complete, you should notice how you're feeling better about what you're able to accomplish within this decision-making framework.

Tip #2: When you're in doubt or feel you've lost your direction, clean up and clarify. Collect papers, notes, and materials, or process a few items in your capture tools.

Review

Quick Tips

Tip #3: When you hit a low-energy spot, disengage (e.g., go for a walk or sit on a bench and watch the clouds roll by). Your trusted system will be waiting for you when you return. One of the many advantages of these lists is your ability to walk away from them.

Tip #4: Schedule your Weekly Review at the same time each week, but if you move it more than a few times in a row, consider changing the time or date.

Discuss & Apply

Reflect & Engage

- Currently, what is the first thing you look at each day (email, calendar, lists, etc.), and what is the impact?

- How could you apply these skills to how you plan each day?

Renew through Review

- What did you discover after doing your first Weekly Review?

- When and where will you consistently do a Weekly Review in the future?

- If you consistently used the GTD skills, what would you anticipate as some of the results?

▶ Next

- **Continue to learn in the online course.**

- **Visit the post-training site:**
  vitalsmarts.com/gtd-training/gtd-coach

- **Share best practices.**

- **Celebrate successes.**

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