Getting Things Done

TODD PALINO

Todd Palino is a Senior Staff Engineer in Site Reliability at LinkedIn on the Capacity Engineering team, creating a framework for application capacity measurement, management, and change intelligence. Prior to that, he was responsible for architecture, day-to-day operations, and tools development for one of the largest Apache Kafka deployments. He is a frequent speaker at SREcon, as well as other venues, on the topic of SRE culture and best practices, and is the co-author of *Kafka: The Definitive Guide*, available from O'Reilly Media. Out of the office, you can find Todd out on the trails, training for the next marathon.
tpalino@gmail.com

Two years ago, I found myself in a bad place, both at work and at home: overworking, ignoring my family, and angry all the time. It took months to understand the problem: I had no idea what work needed to be done. I could only focus on whatever was right in front of me, screaming for my attention. What I needed was a list of the work that I had committed to, that I trusted to be reviewed and complete, presented in a way that made it easy for me to pick the right work to do. I accomplished this with "Getting Things Done"—a process for handling work in a predictable and trusted way.

I lacked organization, which doesn't mean planning your day to the minute—as an SRE I live by the adage that no plan survives contact with the enemy. Not having organization meant I lacked the ability to respond appropriately to new work and ideas with a clear and creative mind. Martial artists practice "mind like water." Chefs have their "mise en place." For engineers, we have "inbox zero." You may call it a fantasy in an interrupt-driven world, but that only reinforces the need to have the planned work neatly maintained.

Most problems with inbox zero come from setting ourselves up to fail. We make a list of things to do today, leading to frustration when the inevitable interrupt happens and ruins our plans. We treat email inboxes as to-do lists, forcing us to continually re-read messages and decide each time what the next action is. Worse, we fail to fully catalog our work, both in the office and at home, and don't set aside the time needed for regular maintenance. When our partial attempts fail, we throw up our hands and declare organization to be an impossible task.

Enter GTD

There are many systems available for personal organization. For the last decade, I've used a system called "Getting Things Done" (GTD for short). Developed by David Allen, and documented in his book of the same name, the concepts have remained the same over the years, even as technology has changed. This is because it's not prescriptive regarding the tools that you use for organization. The process is described, with the characteristics that your trusted system must have, without placing bounds on implementation. It does not require specific software, or even any software at all. Last year, I was using a paper notebook.

You may not be sure what a trusted system is, but you're already using one: your calendar. We recognize that our brains are bad at remembering meetings, events, and the details for them, so we offload them into a calendar. Regardless of the calendar tool you use, when you get an invitation it goes into your calendar. You note whom you are meeting with, when and where the meeting is, and some details on the topic. Once you've done that your brain can let go of the information. This happens because you're consistent about using your calendar—you're checking it at appropriate times, or you trust that a notification will alert you just in time for a meeting.

This is the essence of a trusted system: a list of all of your commitments, which your brain trusts to be complete and regularly reviewed. We have to do this because brains do not organize information in a way that is conducive to getting work done efficiently. It believes that

everything is important, all the time, so it continually cycles through your to-do list. It frequently drops items. It interrupts you randomly with information that you can't use at that time. In order to fix this, we need to make something other than our brain responsible for handling this information.

The tool is just one component—a way to store and present information. What makes it trusted is the process around how you use that tool. GTD's process is made up of five core steps:

- Capture
- Organize
- Clarify
- Reflect
- Engage

Capture

In order to organize work, you first need to collect the pieces of information that prompt us to create it. This is the essence of capture: create a habit of writing everything down. The goal is to only ever have a thought about something to do once—as soon as that happens, you write it down and it enters your trusted system by going into an inbox.

We have several kinds of inboxes. Email is just one type, and you probably have more than one account. Other inboxes include a notes app on your phone, your physical mailbox, and your pocket. It's just a place where you collect stuff that you need to do something with later. Know where all those inboxes are, but have the fewest possible. Most critical is to make sure you always have a way to make a note, paper or electronic, wherever you are.

As soon as you have an idea, write it down. This could be as trivial as "I'm getting low on milk" or as ambitious as "I'd really like to run a marathon." Treat this like brainstorming: don't filter. Capture all ideas, big or small, and only the idea: you don't need to figure out what the next step is, or even whether or not it's truly something that requires action. Capture is about getting it out of your head so you can continue with what you were doing with a clear head.

Organize

Before we discuss how to process everything we've captured, we should have somewhere to store our work. Like our calendar, this needs to be convenient to refer to wherever we are: in the office, running errands, or at home. Most will choose software for this, with far too many options to cover here. Two of my favorites that are tailored for GTD are OmniFocus and NirvanaHQ. Let's talk instead about what we're going to store in this system.

Actions are things that you can actually do. They are a single, discrete step: for example, a phone call. "Make a phone call and email a summary" is at least two actions. This is like a database

transaction: we have to do the action all at once, or we roll back and start over. Our actions will not only have a clear statement of the work to do, they will also have a context. This is where you have to be, or what tool you need, in order to complete the action. Phone calls need a phone, so a good context is "Phone." Looking at a website requires "Internet." Locations can be contexts: there are things that can only be done at "Home," like organizing your spice drawer. People can be contexts, which is helpful for tracking delegated actions or agenda items for your next one-on-one meeting.

What's not needed are due dates or priorities. Priorities are a losing proposition, as you'll constantly waste time re-prioritizing work every time something new arrives. The context will help us filter down the number of actions available to us at any point in time, which will make it easy to see the important ones. As far as due dates are concerned, if something is time sensitive, think about whether or not it should be on your calendar instead. Doing this makes sure that the work gets completed before it is due.

The other concept is a project, defined as a desired result that requires more than one action. Examples might be "August vacation" or "Publish a book." It is a logical container for actions that accomplish a single goal. It's important to have these containers because a project is also a placeholder. When you complete the next action for a project, you need something to continue tracking that project and prompt you to define the next action.

Our organizational system comprises several lists:

- Next actions, preferably able to be organized by context
- Projects (a simple list is sufficient here because the actions will be on the previous list)
- A "Waiting For" list of all the actions we have delegated
- A "Someday/Maybe" list of the projects we might want to do later

Time-sensitive items should go on your calendar, which may be a separate trusted system, and reference items will be stored separately. This keeps your system reasonably sized, so you can carry it with you all the time. This is critical, because you have to be able to refer to it when you need to know what work you should be doing.

Clarify

Let's get back to all of the stuff that we captured. It's time to process it. Set aside the time on your calendar for this. I find that doing this any less than every weekday (except vacations) makes me anxious. I also triage my email inboxes throughout the day as I know there will be interrupts, like last-minute meeting requests. You may have certain inboxes that are processed less frequently, which is OK as long as you are consistent.

Clarify is a process of taking each thing in our inboxes and asking the question, "What is this?" The rule is that you will go through your inbox in order, one item at a time, and nothing goes back in. When you're done, your inboxes will be empty.

Select a single item or email and ask the first question: is this something that requires you to take an action? If not, it is one of three things:

1. **Reference.** Something you need to know, or refer back to later, such as a manual or other document. Reference items need to be stored, and there are many ways to do this: filing cabinets, flash drives, or bookshelves. Like inboxes, minimize the places you store reference and make items easy to find when you're looking for them.

2. **"Someday/Maybe."** Ideas you're not ready to commit to yet. For example, you might have "Run a marathon" or "Summit Mount Everest": maybe soon, but not today. This list of ideas will prompt you to think about them later on, to start when you're ready.

3. **Trash.** If it's not actionable, and not one of the above, throw it out. This might make you uncomfortable. Take that opportunity to evaluate your decision about whether or not it's actionable. If you can't throw it away, it probably represents something you need to do.

For actionable items, determine what the very next action is to move towards completion. Let's think about a couple examples from our day to day:

"Schedule one-on-one meeting." This is a single action: we need to send an invite for the meeting.

"Fix buffer overflow bug." This is not one action: we need to write the code to fix the bug, open and wait for a review, commit the fix, and deploy it. This is a project. We will add "Fix buffer overflow bug" to our "Projects" list. We also need the very next action to take, which is "Write the code to fix the bug."

Now ask how long the action will take to complete. If the answer is two minutes or less, do it right now. It will take less time than it will to track it. For scheduling a meeting, do that now because it will be quick.

Writing code is going to take longer. Actions like this are handled in two ways:

1. **Delegate.** Someone else will do it. If we ask a teammate to write the code, we'll add, "Alice—Code fix for overflow bug" to a "Waiting For" list. This tracks the action and who has it. When we review later, we might need to remind Alice about the work.

2. **Defer.** We will do it. Actions for a specific time can go on our calendar at the time it needs to be done. Otherwise, add it to our "Next Actions" list.

Reflect

It's not enough to put all of these projects and actions into a system, we also need to review that system with a consistent cadence. This is not the same as actually doing the work that we have defined—we're going to talk about that when we get to Engage. Reflect helps ensure that the system represents the totality of the work we need to do, as far as we are aware. This is the step that soothes the brain. When you understand, subconsciously, that anything in the system is going to have your eyes on it in some fixed and recurring time frame, only then will your brain be willing to let it go and trust the system. You know that you'll come back to it at the appropriate time.

How often do you need to reflect? It depends on what makes you comfortable, but a good start is to schedule a weekly review every Friday for two hours. This goes on your calendar because it's important to guard the time. Do not be afraid, or think it is selfish, to reserve time for yourself on your calendar. By doing so, you will make yourself more productive overall.

Routine and habit is the name of the game when it comes to GTD, and the weekly review is no different. Start with clearing your head: capture any thoughts in your head that are bouncing around, and process your inboxes to zero. Then you're going to move into reviewing your entire trusted system to make sure everything is current:

◆ Look at "Next Actions" and check completed actions or capture new ones.

◆ Review last week's calendar to make sure you captured action items.

◆ Review next week's calendar to surface actions to prepare for it.

◆ Check your "Waiting For" list, sending any needed reminders.

◆ Review your "Projects" list, making sure each has a next action.

◆ Review your "Someday/Maybe" list, and pull anything to start into the "Projects" list.

After you finish the weekly review, you're going to feel like you really have your life together. This is one of the reasons I like to do it on Friday afternoon: it lets me go into the weekend knowing that I'm fully organized, and I can set work behind me and be present with family and friends.

Engage

So far we've talked about organizing things, not actually doing them, and there's a good reason for that. When your work is well organized, it's easy to select the right thing to do at any point in time and get it done. You're going to be working from your "Next Actions" list, because this represents all of the things you can do right now without waiting for something else. With the previous four steps in place, we are comfortable that the next actions list represents the totality of the work that we are aware of. We can

quickly narrow down what we can do right now on the "Next Actions" list by four criteria:

◆ Context: Filter out actions that don't match the contexts available to you.

◆ Time: If you have 15 minutes available, you can't do an action that will take longer.

◆ Energy: At the end of the day, you might only have the brain-power to read an article.

◆ Priority: With actions filtered down, it's easy to pick out the highest value one.

What happens when you're interrupted with an alert or some other interruption? First, don't get sucked into automatically doing work as it appears. Knowing your planned work helps with the decision on whether the new item is a higher priority. If it is, set aside your planned work and focus on the new work. Your trusted system will be there when you finish, and you don't need to worry about keeping track of where you were. Just pick up the next action that fits based on the four criteria.

Organizing your work will result in fewer of these interruptions, as well. Many of them exist because we didn't know what our commitments were. We forgot about that bug fix we meant to do. We buried an email that asked us to review a document by a certain date. Prioritizing proactive work will reduce the amount of reactive work required.

Next Actions
Organization is a project, and here are some next actions you can take to free up your brain to do what it's good at: being creative and solving problems.

1. Borrow or purchase a copy of *Getting Things Done* by David Allen.
2. Read the book.
3. Select GTD software (or other tool) to implement your system.
4. Schedule time with yourself for your first pass through Clarify and Organize.
5. Schedule time with yourself for a weekly Reflect session.
6. Schedule time with yourself for a daily Clarify session.

What I have presented here is an overview: there is more to be gained from reading through David Allen's book. You'll gain a deeper understanding of how to work with the GTD concepts as well as an introduction to other topics, such as horizons of focus—how to work with long-term planning and frame the question of what you want to be when you grow up.

The first time you work through processing inboxes, it's going to take a lot of time. You'll need to look at how many emails, and other pieces of paper, you have and make a decision about how much time you need. Don't shortchange yourself—time spent here will return to you 10 times over. Break it down into multiple sessions if needed, but don't leave too much time between them.

Finally, remember that organization is a habit that you need to build. Getting Things Done provides a structured process for managing our work, but it only works if you follow it consistently. It will take time to remember to capture every idea, and you will need to be diligent about guarding your time for both Clarify and Reflect at first. The feeling that you get after clearing out your inboxes and reviewing your trusted system will ensure that the habits, once established, will be hard to break.