Practicing Advanced Productivity Workflow

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MacMania9

ScreenCastsOnline

Welcome & Introduction

Don McAllister

Host/Producer of **ScreenCasts**ONLINE
http://www.screencastsonline.com

Todays Session

* "Mastering Your Inbox" Review

* Why we need to!

* Automating Handling & Processing of Email

    * MailTags & Mail Act-On

* Integrating Email with Task Management

    * OmniFocus - Desktop & iPhone

Get Organised

Some Disclaimers

This may not work for you!

Not mandatory, everyone has different needs and constraints

Hopefully will make you think, and perhaps give you some ideas

Don't Panic!

Get Organised

Don't……

Become an email slave

Use your inbox for everything

Waste your precious time

Make yourself feel bad

Don't Panic!

Fundamental Principles

- Start Processing

- Think about the next step

- Get some structure

Fundamental Principles

- Start Processing

Start Processing Your Inbox

Processing is not........

Answering all of your Emails in one fell swoop!

Checking your emails every 5 minutes!

Fundamental Principles

- Start Processing

- Think about the next step

Start Processing Your Inbox

Things You Can Do With Your Emails

How To Go About It

Reply to it

Things You Can Do With Your Emails

Reply to it
Act on it

Subject: **Meeting on the 29th**
From: ScreenCastsOnline <scodemo@mac.com>
Date: 5 November 2008 16:00:10 GMT+01:00
To: Don McAllister

Don,

Can you attend a meeting on the 29th November @ 2:30pm at Head Office?

Cheers,

Fred

Reply to it
Act on it

Delete it

Reply to it

Act on it

Delete it

Delegate it

Reply to it
Act on it

Delete it

Delegate it

Defer it

Reply to it

Act on it

Delete it

Delegate it

Defer it

File it

With all these options, process your inbox **down** to **zero**!

Sample Workflow.........

How To Go About It

* **Does it require a reply or action?**
  * **Yes**
    * **Will it take less than 2 minutes to reply or act on?**
    * **Yes**
      * **OK then - do it!**
    * **No**
      * **Is it more appropriate for someone else?**
      * **Yes**
        * **Then delegate it**
      * **No**
        * **Then defer it for further action**
  * **No**
  * **File it or Delete it**

Fundamental Principles

- Start Processing

- Think about the next step

- Get some structure

Filing Emails?

- Do you really need to keep it?

- Why create hierarchical mail folders?   **MailTags**

  - Limitations of filing and ease of retrieval using standard Mail.app

- Drag and dropping?   **Mail Act-On**

  - Increase consistency and speed up using automated keystrokes

▼ DONMC123@MAC.COM
- 📁 0 – Defer–Today
- 📁 0 – Newzbin Invite Requests
- ▼ 📁 0 – Show DVDs
  - 📁 200804 – Gallagher DVD
  - 📁 200807–Performers
- ▼ 📁 1 – Archived Mail
  - 📁 2007
  - 📁 2008
- ▼ 📁 2 – Membership
  - 📁 Forwarded to Barb
  - 📁 Gift Certificates
  - ▼ 📁 Jan 2008 – DVDs
    - 📁 2005 DVD
    - 📁 2006 DVD
    - ▼ 📁 2007 DVD
      - 📁 Sent
    - 📁 2008–03
    - 📁 Charter – No DVD
    - ▼ 📁 Charter – With Addresses
      - 📁 Sent
    - ▼ 📁 Full Set
      - 📁 Sent
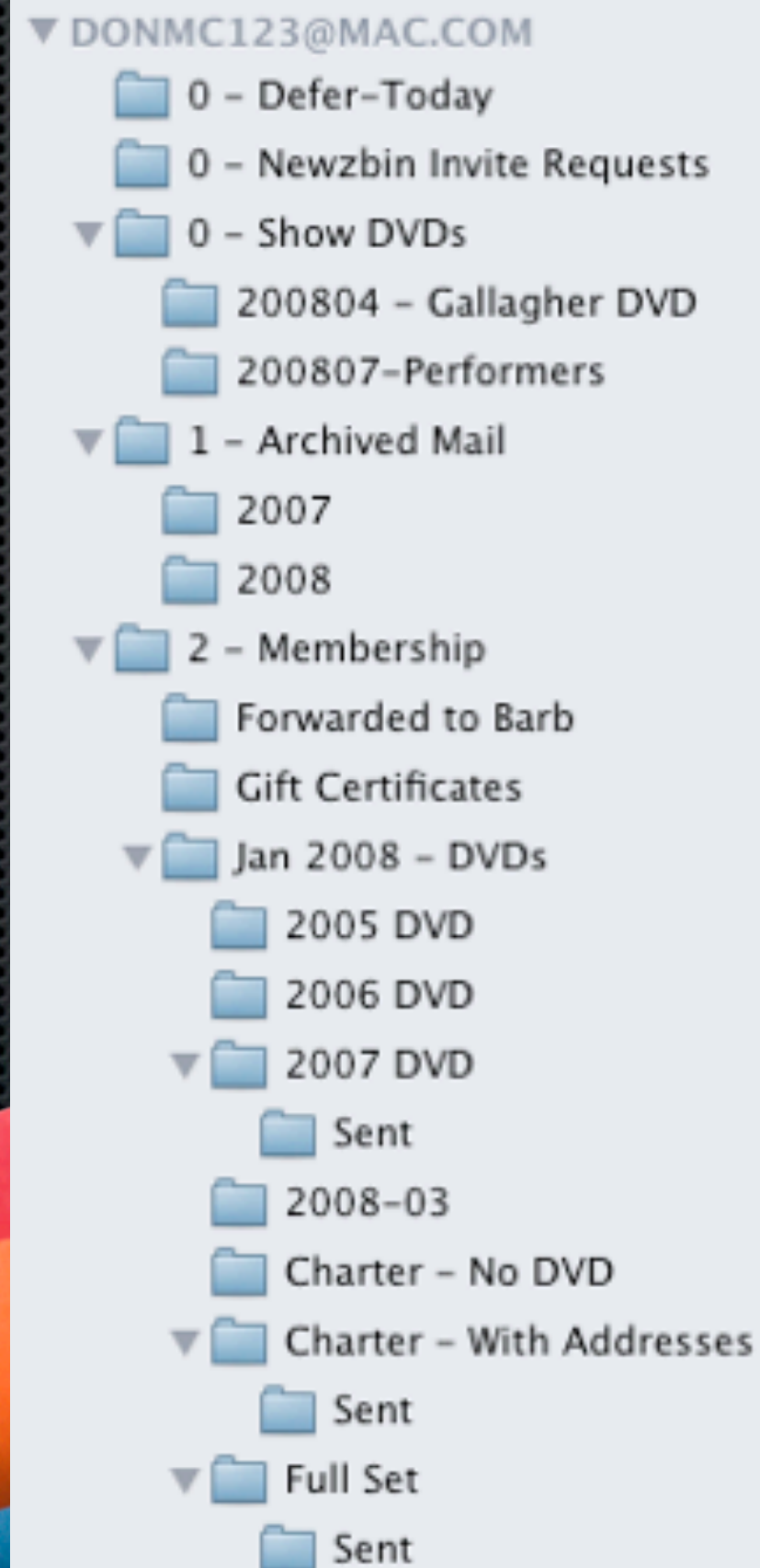
Standard Mailboxes

- Physical Folders

- Requires duplicate copies if needed to be filed in multiple mailboxes

- Thinking required to file - Where did I create that folder?

- Messy to re-organise

Smart Mailboxes

- Virtual Folders

- No need for duplicate copies - the same can appear in multiple folders

- All automatic - Just think about creating the smart folder!

- Very simple to re-organise

Smart Mailboxes - Benefits

- Easy to Setup

- Dynamic - Easy to Update

- Use Smart Mailbox Folders to create structure

- No thinking required to file

- Sync with MobileMe

Smart Mailboxes - Downsides

- Can end up complex - Consider a project?

Solution - MailTags and MailAct-On

Integrated in Mail
IMAP Support
List Display
Ideal for Smart Mailboxes
Works with Mail Rules & Search
iCal Support
Integrates with GTD Apps
Plus More

indev software

Demo

Mail.app plus MailTags plus Mail Act-On

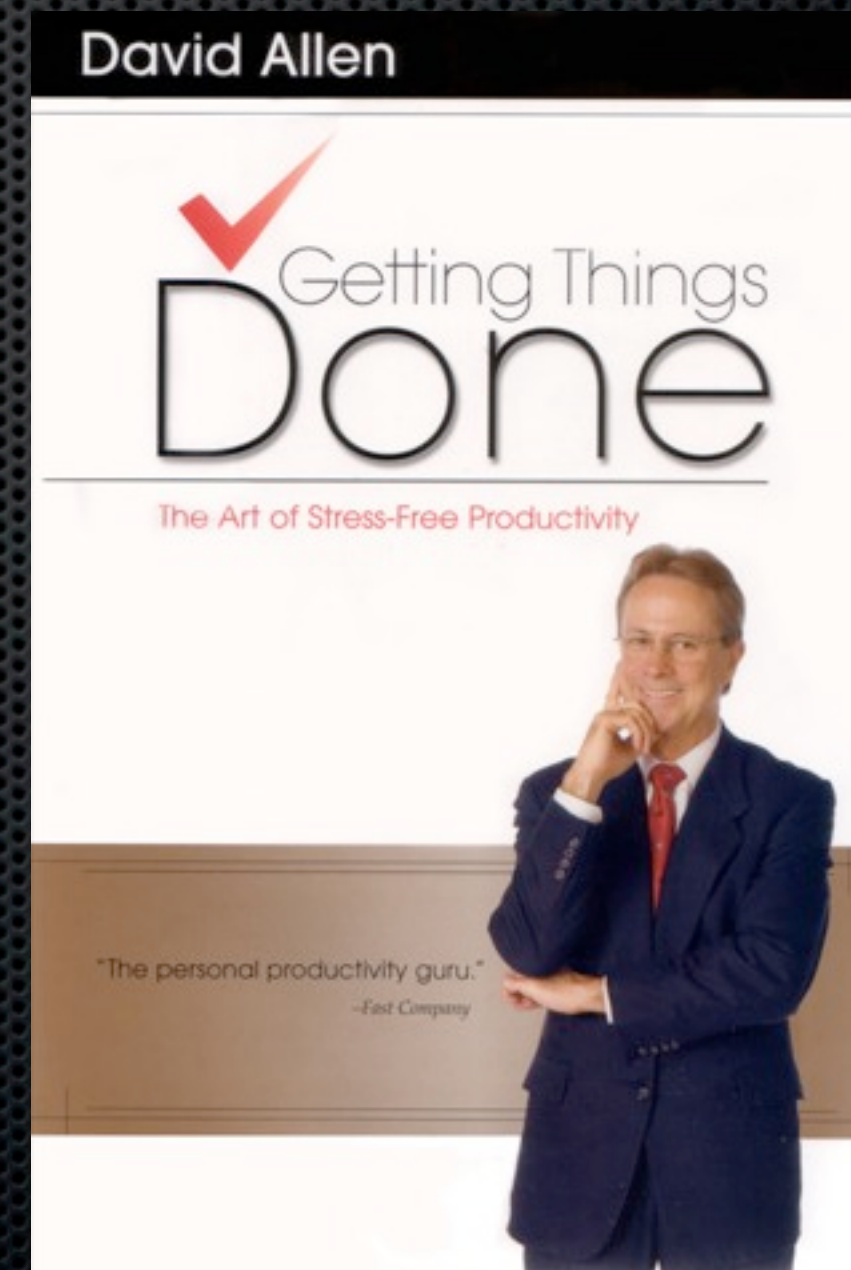Extremely powerful, fully featured
eMail based action system

but what if you want to take it
to the next level.....

Next Level - Integration with **GTD**®

Inspired by "Getting Things Done"
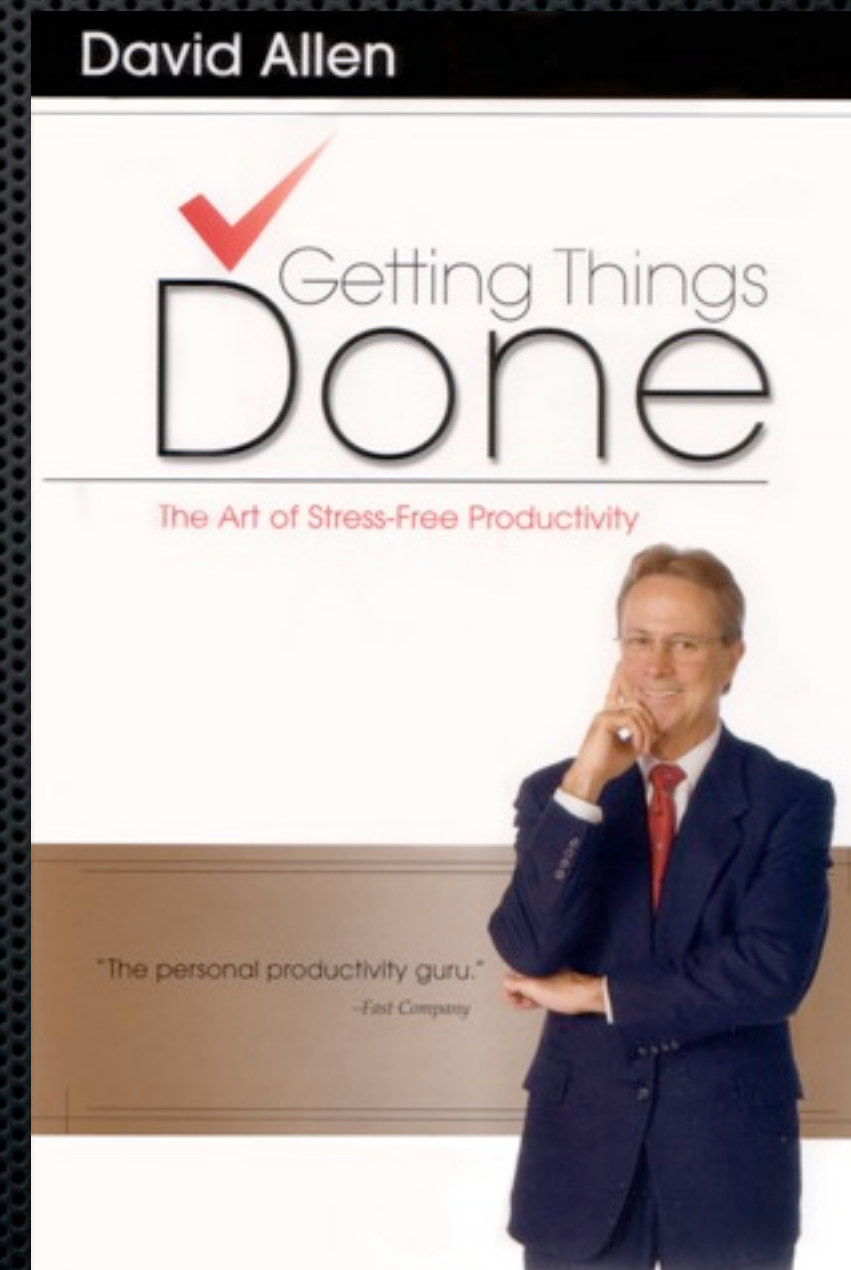*The Art of Stress-Free Productivity*

Four main elements

David Allen
Getting Things
Done
The Art of Stress-Free Productivity
"The personal productivity guru."
–Fast Company

Next Level - Integration with **GTD**®

Inspired by "Getting Things Done"
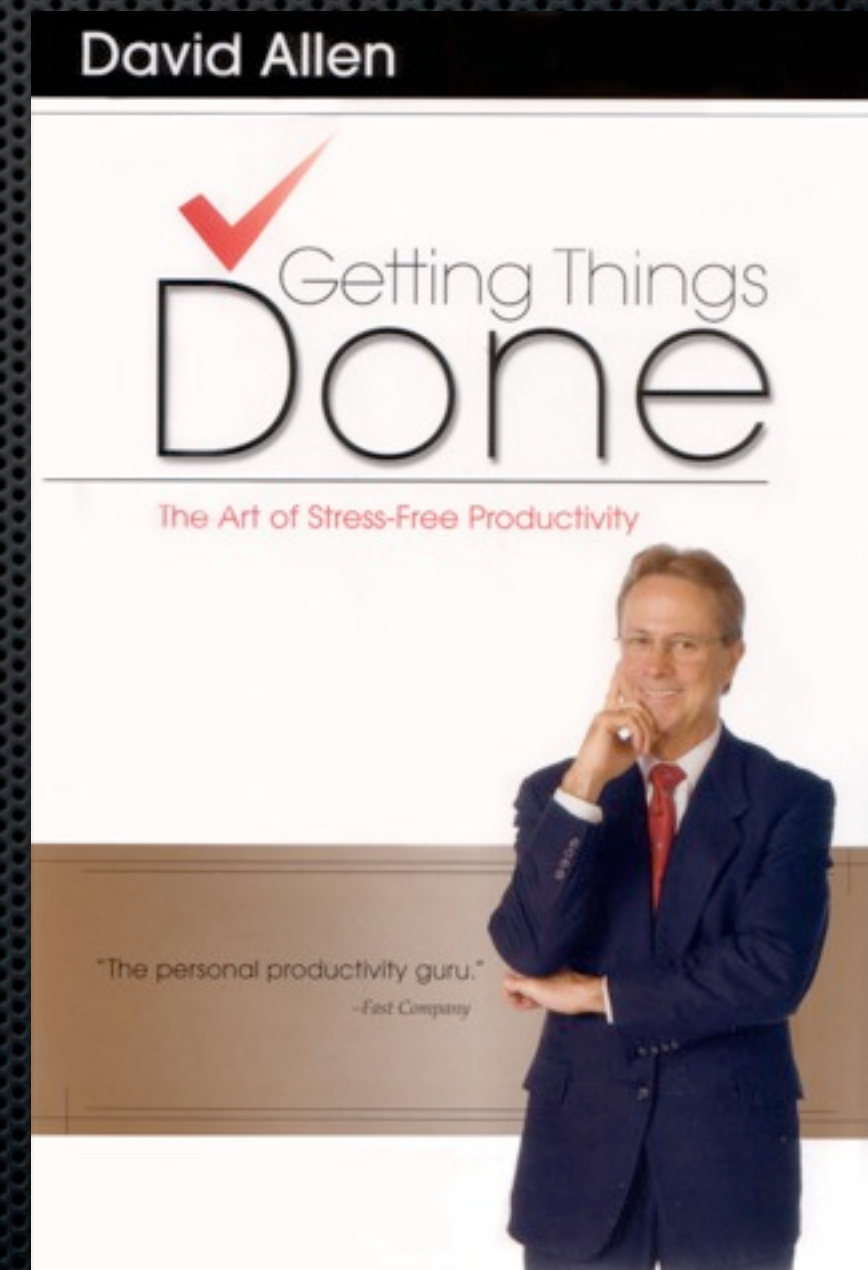*The Art of Stress-Free Productivity*

1 - Capturing anything and everything that has your attention

Next Level - Integration with **GTD**®

Inspired by "Getting Things Done"
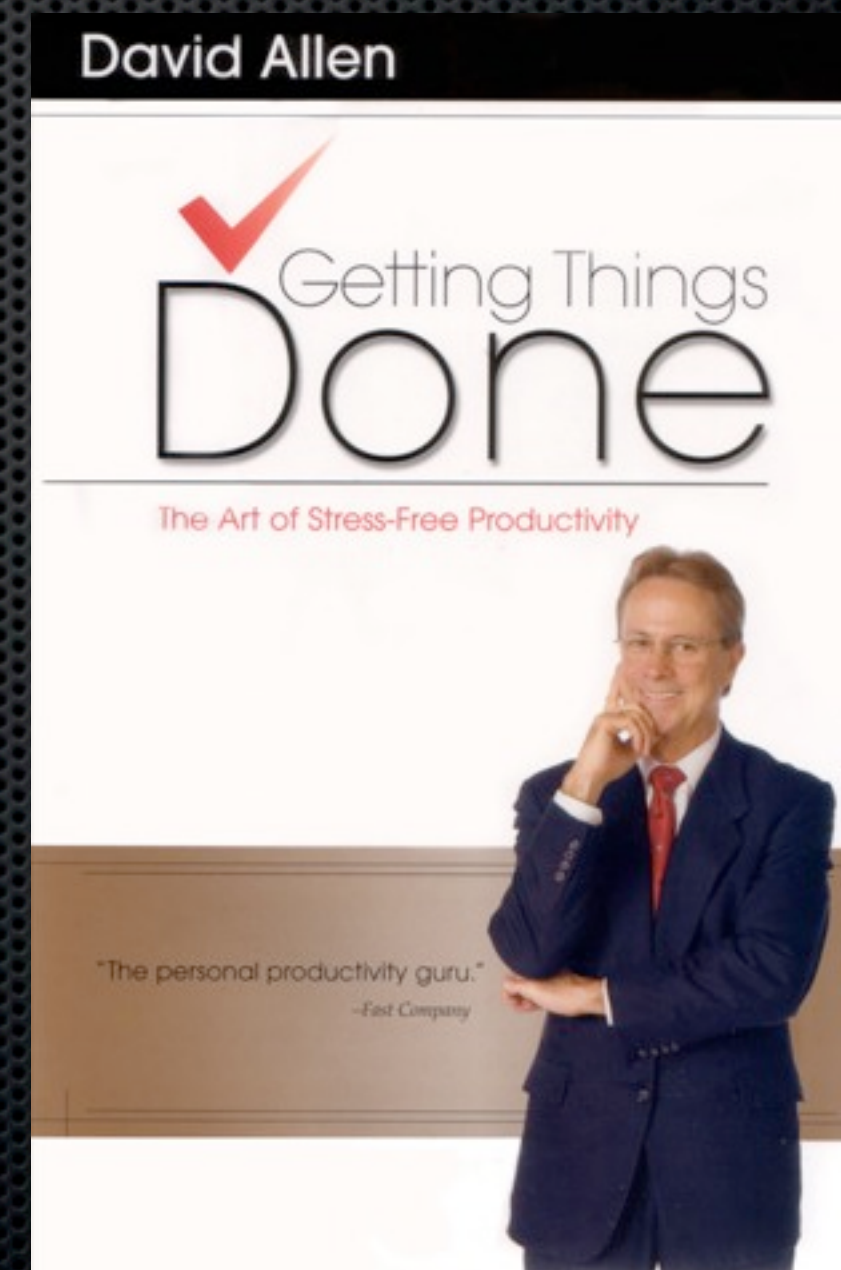*The Art of Stress-Free Productivity*

2 - Defining actionable things discretely into outcomes and concrete next steps

Next Level - Integration with **GTD**®

Inspired by "Getting Things Done"
The Art of Stress-Free Productivity

3 - Organizing reminders and information in the most streamlined way, in appropriate categories, based on how and when you need to access them

David Allen

Getting Things
Done

The Art of Stress-Free Productivity

"The personal productivity guru."
—*Fast Company*

Next Level - Integration with **GTD**®

Inspired by "Getting Things Done"
The Art of Stress-Free Productivity

4 - Keeping current and "on your game"
with appropriately frequent reviews of the
six horizons of your commitments
(purpose, vision, goals, areas of focus,
projects, and actions)
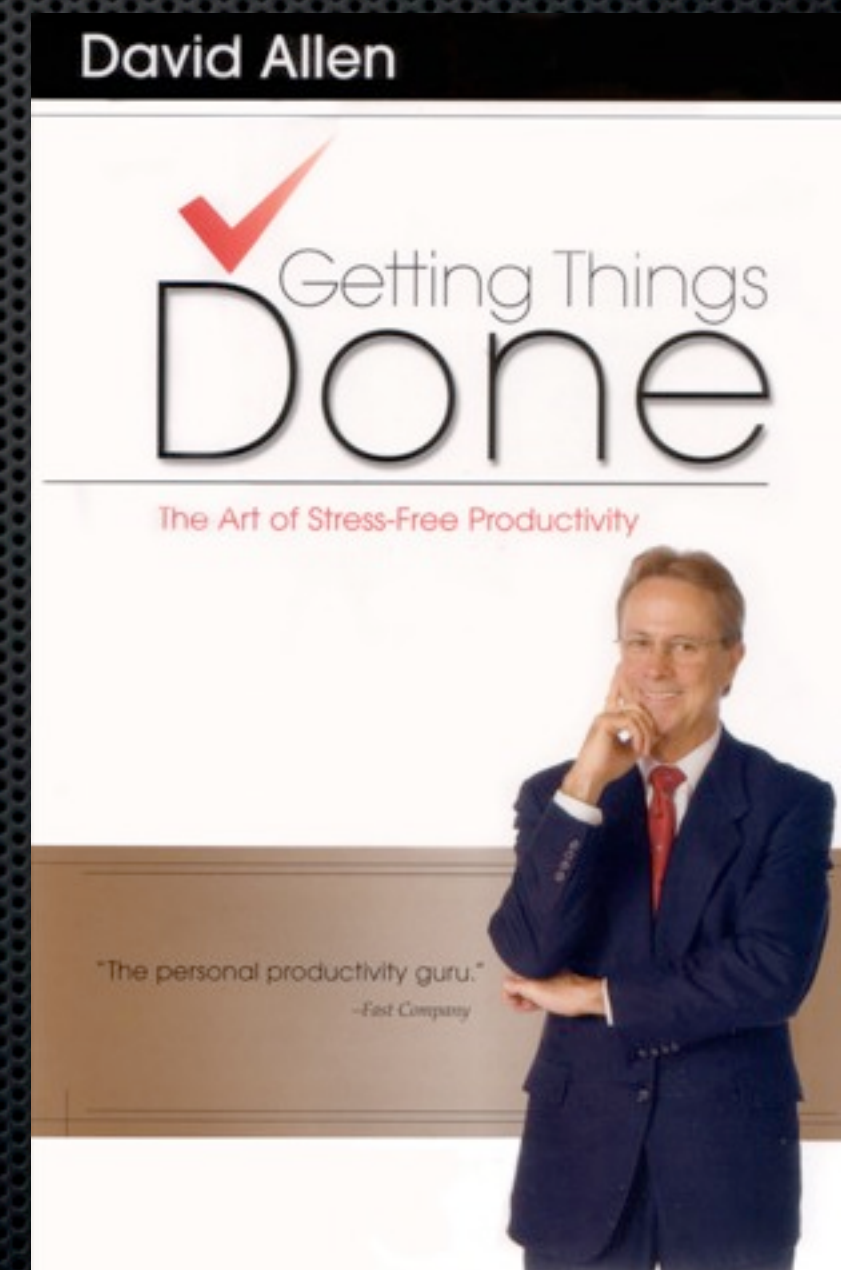
Applications to Help

OmniFocus

Things

The Hit List

Applications to Help

OmniFocus   Things   The Hit List

OmniFocus   Things

Using Mail and OmniFocus for **GTD**

OmniFocus

Professional-grade personal task management

Sync with Multiple Macs
and iPhone

Three Main Concepts in OmniFocus

Action

Something you can physically do in a single step

Project

Goal achieved by more than one action

Context

Physical requirement for an action

Three Main Steps using OmniFocus

Capture

The process of getting all your 'stuff' into OmniFocus

Organise
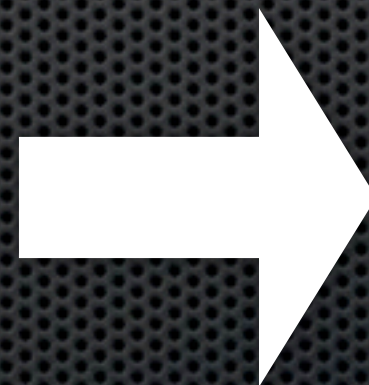
Assigning Projects, Contexts, Dates, etc

Do

Getting the task done and completed

Three Main Steps using OmniFocus

Capture

The process of getting all your 'stuff' into OmniFocus

Demo

OmniFocus on the iPhone

- Syncronises with Mac via multiple service

  - MobileMe, Bonjour, WebDav

- Add Audio and Video to tasks

- True location based contexts via GPS

Any Questions?

Contact Details
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Next Session
Living on the Net - Monday 5:45pm

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