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Move Over David Allen: A Better Way to Get Things Done

By Andrea Cannavina

INTRODUCTION

We are all bombarded with so much information — in our mail, on the phone, through the computer, and even texting to our cell phones. Rather than making our lives easier and less stressful, technology appears to make the battle of information overload that much harder to win. Buzzes, dings, and rings ... the digital deluge never stops. Pile on the paper that crosses your desk every day and no wonder most professionals feel overwhelmed.

I'm not a lawyer, but I feel your pain. I have run a home-based virtual assistant practice for close to eight years. I certainly understand how going digital can make it that much harder to stay organized, not easier.

Unlike complicated software and systems, once you learn the main principles of D-A-F-T it's very easy to apply in many situations.

I've tried to keep up. Over the years, I've read everything I could get my hands on pertaining to organization. In my quest to become and stay organized, I've even gone so far as to purchase specific software and attend paid classes. Problem is, nothing I tried worked for me.

However, I did catch many pearls of wisdom along the way, including the acronym FAT — which stands for File, Act, Toss. It's used by such well known organizational gurus as David Allen and Barbara Hemphill. I've followed these and other masters and did my best to organize by their rules. Unfortunately,

I quickly learned that not everything that I came into contact with each day could be Filed, Acted upon, or Tossed immediately.

Hence, I created a system of my own — D-A-F-T, which adds the missing element that always seemed to trip me up or the "D," which stands for "Defer."

Just like the famous FAT — in D-A-F-T the "F" stands for File, the "A" for Act, and the "T" for Toss, but I've added the "D" and rearranged the letters making D-A-F-T — Defer, Act, File, Toss.

Just as any other system, D-A-F-T takes a little bit of time to put into place, but unlike complicated software and systems, once you learn the main principles of D-A-F-T it's very easy to apply in many situations.

How does this apply in the real world? To begin, I'm going to explain how to use the D-A-F-T system to organize and stay on top of the hundreds, if not thousands, of emails you need to process each week. Once you understand how D-A-F-T applies to emails, it is easy to incorporate this system as an organizational tool for offline processes too.

USING D-A-F-T TO KEEP YOUR EMAIL UNDER CONTROL

To begin, you need the proper folders.

In your email application, create 4 folders: ..Defer; .Act; .File; .Toss.

Please note there are two periods before the D in Defer, one period before the other folder names. This will make your email application keep these folders at the top of your folder list and in correct order.

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These four folders — Defer, Act, File, Toss — are all you need to get and stay on top of your emails and the electronic files and information that travel via email every day.

The only way to stay organized is to keep your Inbox empty. All the time.

I can almost hear every person out there weeping ... trust me, I know! Everyone says it — I get 100, 200, 500 plus messages each day, how am I supposed to empty out my Inbox every day?

Well, that is what “D-A-F-T” is for and being D-A-F-T will make keeping your email Inbox empty a breeze — even easy.

CLEARING YOUR INBOX

As you scan your Inbox, all you need to do is determine which one of the four folders each message belongs — Defer, Act, File, or Toss. Each message you look at should take you less than ten seconds to determine its proper location within the D-A-F-T folders.

You are not to do anything other than scan your Inbox messages and immediately sort each message into one of the four folders.

You can scan your Inbox as many times a day as you feel comfortable; but only to move the messages to one of the D-A-F-T folders.

You do not stop the D-A-F-T process to write a reply; you do not stop the D-A-F-T process to print something out. You move those types of messages to the Act folder and keep sorting the rest of your Inbox until it is empty. Once you get the hang of it, scanning your Inbox literally takes a few minutes and you easily maintain an empty Inbox.

Of course, each time you scan and empty your Inbox, you are not done!

ACT

Immediately click on the Act folder and see which messages require action. Each time you empty your Inbox, before you get up or do anything else, open the Act folder and see what's in there.

According to David Allen's Getting Things Done, if the action will take less than two minutes — do it now. Scan your Act folder and immediately take care of anything that will take less than two minutes to complete. Once you complete the two minutes or less action, move that email message into the File or Toss folder as appropriate.

Each message you look at should take you less than ten seconds to determine its proper location within the D-A-F-T folders.

Now, if the action required of a message in your Act folder will take you longer than two minutes, you take two minutes right then and add the appropriate amount of time necessary to complete the action to your Calendar.

So consider how much time each message in your Act folder will take to complete and if more than two minutes, add an entry to your Calendar to get it done.

Outlook users can drag and drop the email message into the Calendar tab to open a new appointment window.

Once the appropriate amount of time and a date to complete the Act has been scheduled in your Calendar, you can move the message to the Defer folder.

At this point in the D-A-F-T process, your Inbox and your Act folders will be empty.

DEFER

Once you have gone through and emptied your Inbox and Act folders, if time permits, open the Defer folder.

Quickly glance to see if any of the items require your immediate attention, need to be scheduled into your Calendar, or can be completed. When completed,

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items in the Defer folder are moved to the File or Toss folder as appropriate.

You can sort each D-A-F-T folder by sender, date, subject line, color, category, and conversation, or use colored flags to organize the contents of the D-A-F-T folders.

Only items moved from the Act folder to the Defer folder will have a corresponding Calendar entry.

When you initially scan your Inbox, you may also move a message directly into the Defer folder. E-zines you want to read later are a good example of a type of message in the Defer folder that won't have a corresponding Calendar entry.

How the D-A-F-T System really comes together is at the end of the day and with general housekeeping.

Keep in mind it is okay leave things in the Defer folder for an extended period. However, you should not accumulate messages where action is not at some point in the future necessary. This means if your Defer folder starts getting large, schedule time in your Calendar to go through and further organize with color or clean out (i.e., read the last three issues of TechnoLawyer).

FILE

So we've covered Act and Defer, next in the D-A-F-T process is "F" which stands for File.

The File folder is where you put any emails that you want to keep. Receipts for online purchases, confirmation emails, and the like. You should try to keep the File folder as small as possible. Try not to store anything that you can gain access to online. Good examples of items you don't need to File are Yahoo Group messages or listserv discussions (such as those by the ABA's Solosez).

Now, when it comes to filing, I'm not big on having a ton of folders in my email program. You could

technically open a folder for each project, client, purchase ... you name it. That just makes things more disorganized for me.

This is why I group my File emails by date. At the start of each month I create a folder by year and month (2008-11). At the beginning of the next month, anything in the File folder, gets placed in the previous month's dated folder. I then PDF the entire contents of that dated folder to store my emails with my other backed up business records and documents outside of my email program.

REVIEW & TOSS

How the D-A-F-T System really comes together is at the end of the day and with general housekeeping.

At the end of each day, about ten minutes before I wrap up, I scan my Inbox and Act folder to make sure everything is moved accordingly. I then scan my Calendar and navigate to the Defer folder to mull over anything I need to think about or deal with in the morning. And finally, I delete everything in the Toss folder — making my Inbox, Act, and Toss folders nice and tidy for the next day.

D-A-F-T FOR PAPER FILES

One of the best things about the D-A-F-T system is that it is a process that transcends the digital world and works just as well for paper.

To use D-A-F-T with paper you need three folders, stacking bins, or other holding spots, labeled as above — Defer, Act, and File (you can simply "Toss" papers into the old circular file!) You can break down the Defer file further with weekly/daily dividers. Also, depending on your volume of paper, your File folder may need reinforced sides.

Just as with email, you don't want to allow the paper in the Defer and File folders to become out of control. These folders exist to keep the information organized, at hand, and moving — not to serve as a permanent spot for anything.

Follow the sorting of paper documents as above for emails — placing each item in the appropriate Act, Defer, and File folders. Clear out the Act folder by adding items to your Calendar and moving to the

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Defer folder; or completing the task and moving to the File (or Toss) folder. Routinely go through the Defer folder to keep everything moving.

At least once per week, take the papers out of the File folder and scan to PDF to attach to the appropriate client/project file on your hard drive and/or file in the physical client/project folder.

CONCLUSION

That's it! You're done! Email and other electronic information, paper documents, and even your calendar all become organized using one simple system. No special software, no special training. Just the D-A-F-T principles outlined above put you in control. D-A-F-T — Defer Act File Toss your way to organizational success!

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