

# Mastering Workflow Series

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Built upon David Allen's groundbreaking methodology for achieving control and focus amidst a world of constant change and ever-increasing input, this powerful program delivers a highly effective and sustainable way to get meaningful things done.

Developed and tested in the most demanding business environments in the world, these courses provide comprehensive learning and training in the gold standard of personal productivity: the GTD methodology. Based on the international best-selling book *Getting Things Done: the Art of Stress-Free Productivity*, this three-part series provides the best in classroom and virtual instruction, capable of being implemented in work and life, immediately.

It has proven equally valuable to individuals and organizations across the widest spectrum. It has been successful for both senior executives and new hires, in Fortune 50 corporations and NGOs as well as start-ups. It also serves the widest range of people, such as students, creative artists, entrepreneurs, physicians, homemakers, and solo professionals - virtually anyone wanting to manage a busy life more effectively.

The **Path of GTD Mastery** incorporates a complete set of practices that are capable of being understood and applied instantly, but which additionally provide an enduring model for achieving stability, focus, and productive engagement for a lifetime. Like any sophisticated art, craft or science, the methodology embodies an infinite variety of subtlety, multiple tiers of excellence in its execution, and immense satisfaction in its practice.

The three primary courses of the series provide the core building blocks for the GTD mastery path:

1. **Fundamentals:** Critical principles and techniques for gaining and staying in control, day to day.  
Key result: stability.
2. **Projects & Priorities:** Key elements for defining and managing one's complete inventory of multi-step outcomes within an integrated system, providing control and appropriate focus, week to week.  
Key result: clarity.
3. **Focus & Direction:** A dynamic model for clarifying and aligning commitments, values, and interests at all levels, joining vision with action and execution, providing lifetime keys for staying positively oriented and engaged, no matter what.  
Key result: coherence.

## Key benefits of the Series

- Teaches the best practices for executing on projects, strategies, and initiatives – how to get things done utilizing outcome/next-action thinking. It clarifies, supports and galvanizes current key organizational work.
- Easily adopted behaviors produce greater freedom for individuals and groups to focus on the most significant things.
- Eliminates distractions and noise, and makes available more mental space for creative, innovative, and strategic thinking.
- Streamlines collaboration and clarifies communication, providing a common lexicon and set of best practices for email, meetings, team- and one-on-one interactions.

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## Key features of the Series

- It is sequential, building on the material of the previous session. Though each course is complete and self-contained within its own scope, together they combine to deliver a total mastery path for self-management.
- Each course can be delivered in one-day or two half-day formats.
- Each course has a set of optional follow-on implementation and reinforcement workshops, which can be delivered in person or via webinar.
- The rigorous certification criteria for Master Trainers and Trainers in each course ensure consistent top quality delivery of the material.
- Each component in the series is easily piloted and expandable.
- Supports all other organizational strategies and initiatives, using real work in real time for implementing the GTD processes.

We appreciate your interest in this uniquely valuable educational program, and look forward to working with you to explore its potential value to you, your organization, and your efforts.

# Mastering Workflow Series Overview

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## About the Series

The Mastering Workflow Series is a productivity training program, designed to improve both individual and organizational results. The series offers three instructional courses and a comprehensive set of follow-up workshops and webinars to support learners in achieving success with their implementation of the Getting Things Done® (GTD®) methodology.

## About the Courses

### Level One: Fundamentals

The Fundamentals Course builds the foundation for learners to put GTD to work—at work, at home, and in everything they do.

The course focuses on the key models for:

- Capturing everything that requires a decision into leakproof collection tools
- Deciding the nature of the input and what needs to be done about it
- Creating trusted organizational categories for tracking projects, actions, and reference
- Developing supportive processes to stay clear and current on a regular basis
- Executing on trusted choices about what to do—including breaking through procrastination and effectively managing priorities

### Level Two: Projects & Priorities

The Projects & Priorities Course is the next level of mastery for graduates of the Fundamentals course. This course dives deeper into the GTD models for defining and planning projects and managing priorities.

Course content includes:

- Capturing and refining a complete, current and clear inventory of projects
- Developing priorities through the Horizons of Focus® model, particularly emphasizing professional and personal areas of focus
- Developing projects through the Natural Planning Model®, including:
  - Defining purpose and guiding principles
  - Clarifying the desired outcome
  - Brainstorming ideas
  - Organizing project details
  - Executing on next actions
- Building an integrated system

### Level Three: Focus & Direction

The Focus & Direction Course delivers the framework for the final level of mastery of the GTD methodology. This course ties together the tactical models for getting workflow under control in Level One with the more strategic models for gaining perspective in Level Two. It emphasizes the effective use of the scopes and formats of the Horizons of Focus® model. Learners gain a greater understanding of the power of focused attention, and how control and perspective come together for greater clarity, creativity, and productivity.

Course content includes:

- In-depth exploration of the six Horizons of Focus®, and how they are effectively utilized
- Creating alignment and positive links between the horizons and actions
- Exploring how vision and focus powerfully increase perception and performance
- Integrating all aspects of Mastering Workflow into a coherent, coordinated system

# Mastering Workflow Series Overview

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## Course Format

One-day or two half-day courses are led on-site by an expert Certified Trainer. Course content is presented through engaging lectures, videos about the best practices, hands-on exercises, group discussions, and Trainer demonstrations.

## About the Follow-Up Workshops/Webinars

The Installation and Implementation Series is a dynamic way to ensure graduates of the courses are well-equipped to build and maintain trusted systems and deepen their learning. All sessions can be delivered in an on-site workshop or virtual webinar delivery format.

## About Us

David Allen Company is a global training and consulting company, widely considered the leading authority in the fields of organizational and personal productivity.

## Contact Us

David Allen Company  
407-F Bryant Circle  
Ojai, CA 93023  
USA  
+1.805.646.8432  
seminars@davidco.com  
davidco.com

# Fundamentals

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## About the Mastering Workflow Series

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## About the Fundamentals Course

The Fundamentals course builds the foundation for learners to put GTD to work—at work, at home, and in everything they do.

The course focuses on the key models for:

- Capturing everything that requires a decision, into leakproof inboxes
- Deciding what captured input means and what needs to be done about it
- Creating trusted organizational buckets for tracking projects, actions, and reference
- Developing supportive processes to stay clear and current on a regular basis
- Executing on trusted choices about what to do—including breaking through procrastination and effectively managing priorities

## Course Format

One-day or two half-day courses led on-site by an expert Certified Trainer. Course content is presented through engaging lectures, videos with David Allen sharing about the best practices, hands-on exercises, group discussions, and facilitator demonstrations.

## Participant Materials Include

- Detailed workbook, with information and examples on the concepts presented in the course
- Jumpstart Guide to use as a starter system for tracking projects and actions
- GTD System Guides, which summarize the key models covered in the course
- *Getting Things Done: The Art of Stress-Free Productivity* book

## Learning Objectives

After completing this course, participants will be able to:

- Apply the key GTD principles and concepts for Mastering Workflow
- Identify productivity improvement opportunities
- Take steps to install a their own GTD workflow system

## Installation and Implementation Series of Workshops and Webinars

To further support learner's mastery of this level, short follow-up sessions are offered after the one-day course.

Options include:

- Fundamentals Course Refresher
- Installation Lab
- Guided Setups for common software
- Guided Mind Sweep
- Guided GTD Weekly Review®
- Calendar Management
- Email Management

# Fundamentals

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## Prerequisites

None

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## Projects & Priorities

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### About the Series

The Mastering Workflow Series is a productivity training program, designed to improve both individual and organizational results. The series offers three instructional courses and a comprehensive set of follow-up workshops and webinars to support learners in achieving success with their implementation of the Getting Things Done® (GTD®) methodology.

### About the Projects & Priorities Course

The Projects & Priorities course is the next level of mastery for graduates of the Fundamentals course. This course dives deeper into the GTD models for handling projects and managing priorities.

Course content includes:

- Capturing and refining a complete, current and clear inventory of projects
- Developing priorities through the Horizons of Focus® model, particularly using Areas of Focus
- Developing projects through the Natural Planning Model®, including:
  - Defining purpose and guiding principles
  - Clarifying the desired outcome
  - Brainstorming ideas
  - Organizing project details
  - Executing on Next Actions

### Course Format

One-day or two half-day courses led on-site by an expert Certified Trainer. Course content is presented through engaging lectures, videos with David Allen sharing about the best practices, hands-on exercises, group discussions, and Trainer demonstrations.

### Participant Materials Include

- Detailed workbook, with information and examples on the concepts presented in the course
- Jumpstart Guide to use as a starter system for project planning
- *Ready For Anything* book

### Learning Objectives

After completing this course, participants will be able to:

- Define projects as clear outcomes
- Structure a complete project inventory
- Apply the Natural Planning Model to projects
- Define priorities with the Horizons of Focus

### Installation and Implementation Series of Workshops and Webinars

To further support learners in their mastery of this level, short follow-up sessions are offered after the course.

Options include:

- Projects & Priorities Refresher
- Priority Management
- Planning Projects

# Projects & Priorities

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## Prerequisites

Graduates of the Level One: Fundamentals Course

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## Focus & Direction

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### About the Series

The Mastering Workflow Series is a productivity training program, designed to improve both individual and organizational results. The series offers three instructional courses and a comprehensive set of follow-up workshops and webinars to support learners in achieving success with their implementation of the Getting Things Done® (GTD®) methodology.

### About the Focus and Direction Course

The Focus & Direction course is the next level of mastery for graduates of the Projects & Priorities course. This course ties together the tactical models for getting workflow under control in Level One with the more strategic models for gaining perspective in Level Two. It emphasizes the effective use of the scopes and formats of the Horizons of Focus® model. Learners gain a greater understanding of the power of focused attention, and how control and perspective come together for greater clarity, creativity, and productivity.

Course content includes:

- In-depth exploration of the six Horizons of Focus®, and how they are effectively utilized
- Creating alignment and positive links between the horizons and actions
- Exploring how vision and focus powerfully increase perception and performance
- Integrating all aspects of Mastering Workflow into a coherent, coordinated system

### Course Format

One-day or two half-day courses led on-site by an expert Certified Trainer. Course content is presented through engaging lectures, videos sharing about the best practices, hands-on exercises, group discussions, and Trainer demonstrations.

### Participant Materials Include

- Detailed workbook, with information and examples on the concepts presented in the course
- *Making It All Work* book

### Learning Objectives

After completing this course, participants will be able to:

- Describe the Horizons of Focus and how they can be managed
- Describe how focus and vision produce results in perception and performance
- Clarify direction and priorities using the coordinated tools of the Mastering Workflow series

### Installation and Implementation Series of Workshops and Webinars

To further support learners in their mastery of this level, short follow-up sessions are offered after the course.

Options include:

- Horizons of Focus refresher
- Going further: Purpose and Principles
- Going further: Vision and Goals
- Going further: Areas of Focus
- Lifelong lifestyle of GTD mastery

### Prerequisites

Graduates of the Level Two: Projects and Priorities Course

## Focus & Direction

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# The Path of GTD Mastery

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Over the years we have noticed a consistent trajectory of maturation of the people who subscribe to the GTD methodology. We have now begun to make that implicit journey explicit – the **Path of GTD Mastery**.

GTD is similar to any art or craft, in that it can become a lifelong endeavor and experience. Much like chess, painting, dancing, and gardening, GTD embodies an infinite horizon of subtlety, multiple tiers of excellence, and immense satisfaction in its practice.

We have distilled this path into three distinct levels, represented by the three courses we have created for the global distribution of GTD education:

## **Mastering Workflow Series: Level One**

### **Fundamentals**

#### **Getting Control of Your Workflow**

##### **Key Result: Stability**

This initial implementation of GTD involves the critical distinctions of the five steps of workflow mastery: collect, process, organize, review, and do. It focuses on the necessity of capturing all potentially meaningful inputs into trusted tools (e.g. the in-tray), the executive decisions required to clarify their nature and generate actions and outcomes (clearing inputs and backlogs), the primary and discreet categories for organizing information and reminders, the procedure for integrated orientation (review), and how to optimize one's system to make priority choices.

Excellence at this level includes habitual behaviors that maintain day-to-day control: capturing "stuff" into external locations; processing "in" to empty consistently; applying the 2-minute rule; next-action decision-making when things show up vs. when they blow up; tracking actions contextually vs. unworkable daily to-do lists; email under control; delegating and tracking deliverables appropriately; a functioning reference system; and the awareness of the six horizons of focus. There is a coordinated workstation, at least in the key location where the primary volume of work activity occurs.

## **Mastering Workflow Series: Level Two**

### **Projects and Priorities**

#### **Integrated and Clarified Life Management**

##### **Key Result: Clarity**

The next stage in the Path of GTD Mastery is represented by

1. A new and more complete degree of "mind like water" – with the facility to recognize tensions as they emerge and transform them into controllable outcomes and doable actions. Problems, issues, and opportunities are translated into real projects with executable next actions.
2. A facility to apply an effective thinking process on any situation or project, to get it onto "cruise control."
3. Consistent orientation reviews of life and work, "bringing up the rear guard" by getting one's external system current and complete and trusting tools, structures, and personal behaviors to sustain control and perspective – on a week-to-week basis.
4. Basic trust in personal structures, functions, and processes which foster customization to optimize one's unique circumstances. Demonstrated ability to change lists, categories, etc. to stay relevant to changes in job, focus, and lifestyle.

# The Path of GTD Mastery

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## **Mastering Workflow Series: Level Three**

### **Focus and Direction**

### **Total Life Management**

### **Key Result: Coherence**

This level incorporates the facility to clearly distinguish the different Horizons of Focus - Purpose/principles; vision; goals; accountabilities; projects; and actions – and how to utilize those discreet frameworks to create, align with, and execute on any desired outcome, for any aspect of an enterprise as well as for one's life.

The focus here is integrity and quality of commitments and desired outcomes, tied to their seamless execution. This includes an understanding of the principles and power of outcome thinking, and its effect on perception and performance; and the ability to translate commitments cross-horizon. How does your strategic plan relate to the actions on your lists? How do your meetings on your calendar point to larger and bigger things to affirm that you're about? Etc.

This course pulls together the idea of the “ultimate map room” – i.e. the awareness and capacity to create, update, refine, and utilize the orientation tools that optimize our experiences – seeing the best things to see, at any time, from the best perspective.

It includes building awareness of the total “life management ecosystem” and provides directions for building systemic support for creativity, innovation, and fulfilling engagements. What defines the reaches and limits of things that have your attention? How do you keep those boundaries current and appropriately sized?

This course and level is about creating the awareness, freedom, and capacity to “make it up, and make it happen” – no matter what – for the rest of your life.