# Get Things Done with Wrike

or: My manager is making me use this tool and now I have to read this PDF.

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# Welcome to Wrike!

So, it turns out someone decided you and your colleagues should use Wrike. Nobody likes having anything imposed on them, so it's normal if you're a bit rankled. Now here's the good news: Wrike is pretty awesome!

Seriously, there are some great benefits to embracing Wrike as your personal (and team) work platform. Here are just a few:

## 1. Escape the email black hole

Black holes can literally suck time and space, so the analogy fits well: "too much email" is credited as the #1 employee energy drain. Did you know the average worker spends **1/4 of each workday** reading and answering email? Wrike eliminates the need for all those emails assigning tasks, requesting status updates, reporting completion, or sending file attachments.

## 2. Kill pointless meetings

Meetings have grown to eat up almost 40% of the workweek. That's two full days every week! And most estimates say *half* of that time is pure waste. Wrike has two positive effects on this front: first, you no longer need status update meetings (this also eliminates a bunch of dreaded reporting!). Second, when run with Wrike, meetings become more purposeful and action-oriented: the agenda can be jointly defined and followed by the team, and next steps can be captured and assigned immediately.

## 3. Solve the file storage puzzle

*Where is that document? Is it on my hard drive? In Dropbox? On the server? Maybe it's attached to that email from about a week ago.... Wait, how are we already on version 9?! I only have version 5!*

Wake up from the file management nightmare. Wrike integrates with Box, Dropbox and Google Drive, and you can attach files directly to tasks from these file sharing services or from your computer. And since you can preview and edit attachments without downloading them first, you can collaborate with your team directly on the task, instead of emailing attachments back and forth.

## 4. Manage your manager

Get your micromanager boss off your back by providing him with real-time visibility of your workload and progress through Wrike. No need for reporting, emailing or status meetings!

Or perhaps you're a victim of "crazy-maker" bosses, the kind that believe they're visionaries and attribute work chaos to their genius intellect. In Wrike, it's easy to adjust to shifting priorities and changing directions. Now your boss's once-wild ideas can be captured in Wrike and translated into actionable tasks.

## 5. Boost your personal productivity

Personal productivity isn't about working harder. It's about doing less in order to achieve more. By spending less time and effort navigating an unstructured mess of tasks and reminders, we can channel our energy into creative thinking and truly valuable work.
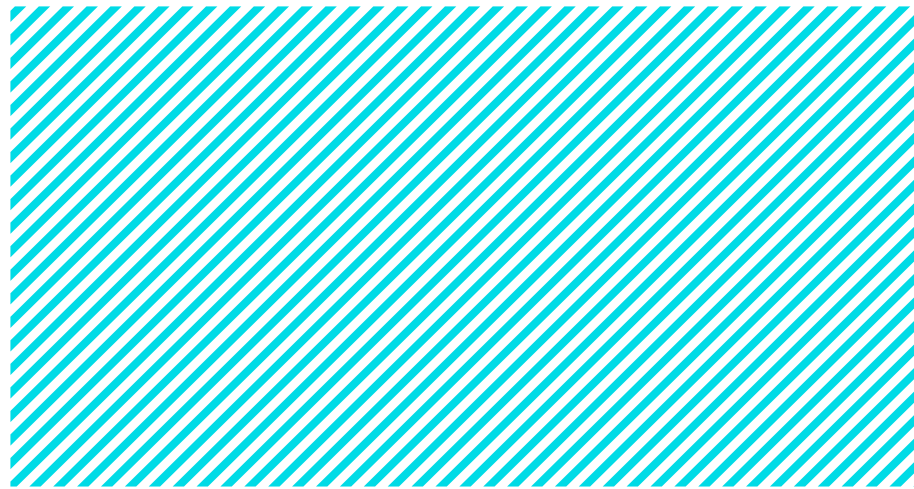
# Bonus benefit:
# Get ahead of the pack

**We all know that traditional messaging systems and spreadsheets are insufficient for keeping up with the increasing speed of change. Disruption is coming. The wave of companies adopting social tools like Wrike is growing. By starting now, you'll be surfing the wave while others are still figuring out what hit them!**

We're sure you'll find tons of other benefits after adopting Wrike. For the time being, we'll discuss the point that is most in your control: **boosting your personal productivity.**

There are many approaches out there for personal productivity. One that resonates with many people is *Getting Things Done* (GTD) by David Allen. It's flexible, action-oriented, structured, and it provides perspective and control over your commitments — just like Wrike! (That's why we like it.) Once you understand GTD's basic

principles, you can design your personal system in Wrike any way that suits your unique working style.

To help you get started quickly, this simple introduction to GTD covers its 3 key principles, 5-Step workflow, and instructions for setting up GTD in Wrike.
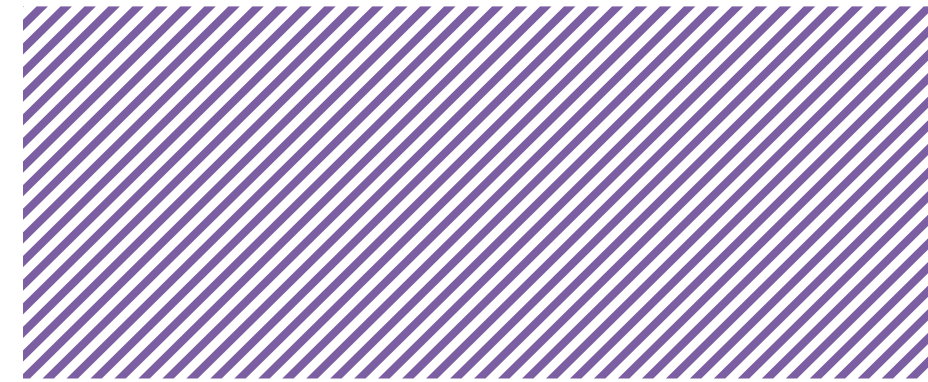
# 3 Key Principles of GTD:



### Keep nothing in your head.

Your brain is great for generating ideas, but not for storing them. Write everything down to free up some brainpower and keep those brilliant ideas coming.

### Determine the next action.

The longer something sits stagnant in your head, the more it weighs on you and the more you stress about it. Once you've captured your idea, create an actionable "first step" and get it off your mind.

### Trust your system.

The only way to achieve stress-free productivity is to have a system that you really trust to manage all of your ideas and reminders. We hope this guide will help you create that system within Wrike.

# The 5-Step GTD Workflow:

## Step 1. Capture: Collect Whatever Grabs Your Attention

**This step is pretty simple: essentially, whenever something captures your attention or distracts you from what you're doing, write it down. That sudden realization you need to pay the cable bill? Write it down. An exciting idea for a new product or feature? Write that down, too! The perfect article headline that pops into your head while you're making dinner? Write it all down! It doesn't matter if it's professional or personal, big or small, urgent or not: capture everything.**

## How to do it in Wrike

Capture ideas as individual tasks in Wrike either in your internet browser, or on your mobile device with our native apps for Android or iOS. More of a paper person? That's OK. Take a picture of your notes with your smartphone and upload it to a Wrike task.

If you get most of your inspiration while surfing the web, install Wrike's Chrome extension. You can turn any webpage into a task and even capture a screenshot for future reference. Perhaps you're already taking notes and logging ideas with another application. No problem! Automatically transferring tasks and reminders to Wrike is a breeze, thanks to our integration with Zapier.

Do most of your tasks and reminders come from email? Forward any email to wrike@wrike.com to turn it into a task. Or, use the Wrike plug-in for Gmail, Outlook, or AppleMail to turn the message into a detailed task with a single click. Hands full with coffee, papers, or keys? Use your smartphone to dictate an email message with the task instructions and send it to wrike@wrike.com. The new task will be created automatically, ready and waiting in your workspace the next time you log in to Wrike.

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# How to Create Task from Emails:

☐ Create a Wrike folder called "0- Inbox" (learn more about <u>creating folders</u>)

☐ <u>Configure your profile</u> so tasks created from emails are automatically included in your "0-Inbox" folder

☐ Save <u>wrike@wrike.com</u> to your email contacts

☐ Or, install the Wrike plug-in for your email client: <u>Gmail</u>, <u>Outlook, or AppleMail</u>

# Step 2. Clarify: Define Next Actions

You're surely feeling better now that your head is clear and your "Inbox" folder is full. But, it's probably full of vague, fluffy "stuff" that can creep back into your head to haunt you. The only way to keep all that stuff in your Inbox folder from hanging over your head is to transform it into a **"Project"** or **"Next Action."**

Start by reviewing each item in your Inbox and asking yourself: is it actionable?

• If no, trash it. (Don't be afraid!)
• If yes, define the *immediate* Next Action and create a task in Wrike.
• Can't decide? Set it as backlogged (don't set a specific due date), log it in a "Remind Me Later" file and set up a future reminder.

## Tip:

If an action will take you less than 2 minutes to complete, do it **immediately** instead of capturing it for later. This simple habit can save you hours in the future, since it usually takes more than 2 minutes to review an action and make a decision. Besides, simple accomplishments have a huge impact on your motivation!

## How to do it in Wrike:

When you're creating your Next Actions tasks, start the task name with a verb, like "Write," "Call," "Review," etc. If there's more than one step, you have a *project!* Create a new folder, name it with your project title, and break that item into a series of actionable tasks.

## Example:

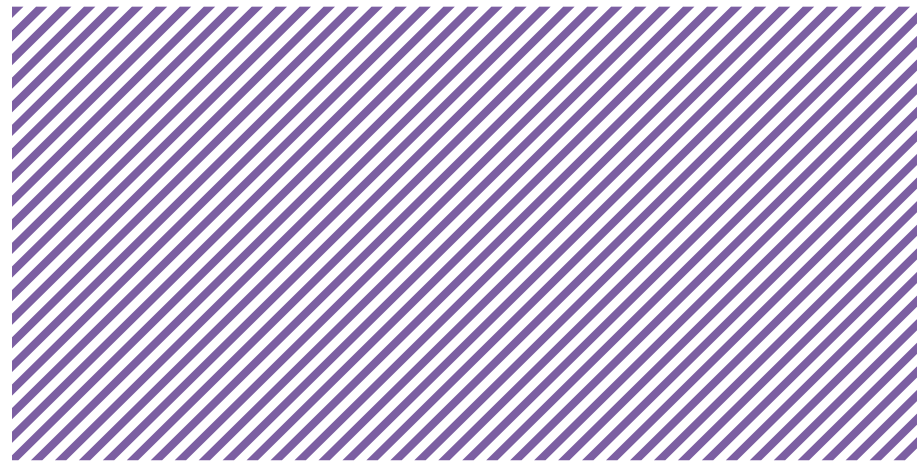**Stuff:** An email from your sister mentions your mother's upcoming birthday.
**Project:** Buy Mom a Birthday Gift for Saturday
**Next Actions:**

- Browse Pinterest for gift ideas
- Call Dad to confirm they'll be at home on Saturday
- Buy a gift and card
- Ship package

# Step 3. Organize: Sort Reminders and To-Dos

Set up an efficient way to organize your reminders so they're at hand right when you need them. After all, you don't want a reminder to buy milk when you're on your way home from the store, groceries in hand.

In *Getting Things Done*, David Allen offers a suggestion that goes against many of our ingrained to-do list instincts: don't sort your task list by priority. Since priorities can shift with the wind, Allen suggests making to-do lists based on "context."
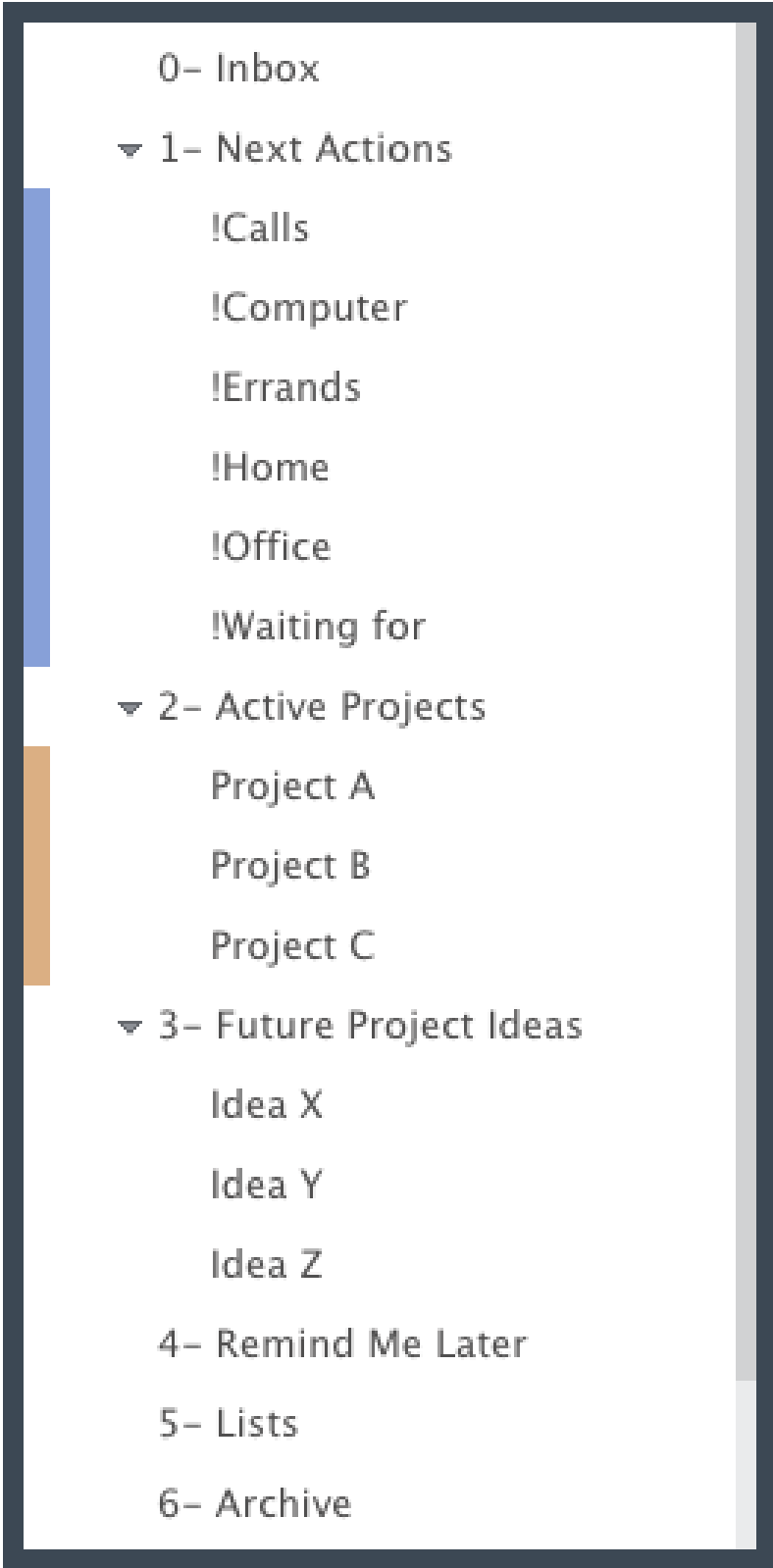
A context is the first limiting factor for executing a task. Categories like: At the Office, At Home, Errands, and Calls are contexts. Sorting to-dos by context solves a big problem with long, comprehensive to-do lists: figuring out what you can do *right at this moment*. For example: most people can't "Do laundry" while at the office, or "Make Q1 Presentation Slides" while browsing the supermarket aisles. But if you have a designated "Calls" list? Whenever you have 5 minutes and a phone, you can pull out your Calls list and get something done.

# How to do it in Wrike

In Wrike, a *Next Action* is a Task. Folders are usually *Projects*, *Contexts* or *Lists*. Here's one way you can set up your folders and subfolders in Wrike:

0– Inbox

▼ 1– Next Actions

!Calls

!Computer

!Errands

!Home

!Office

!Waiting for

▼ 2– Active Projects

Project A

Project B

Project C

▼ 3– Future Project Ideas

Idea X

Idea Y

Idea Z

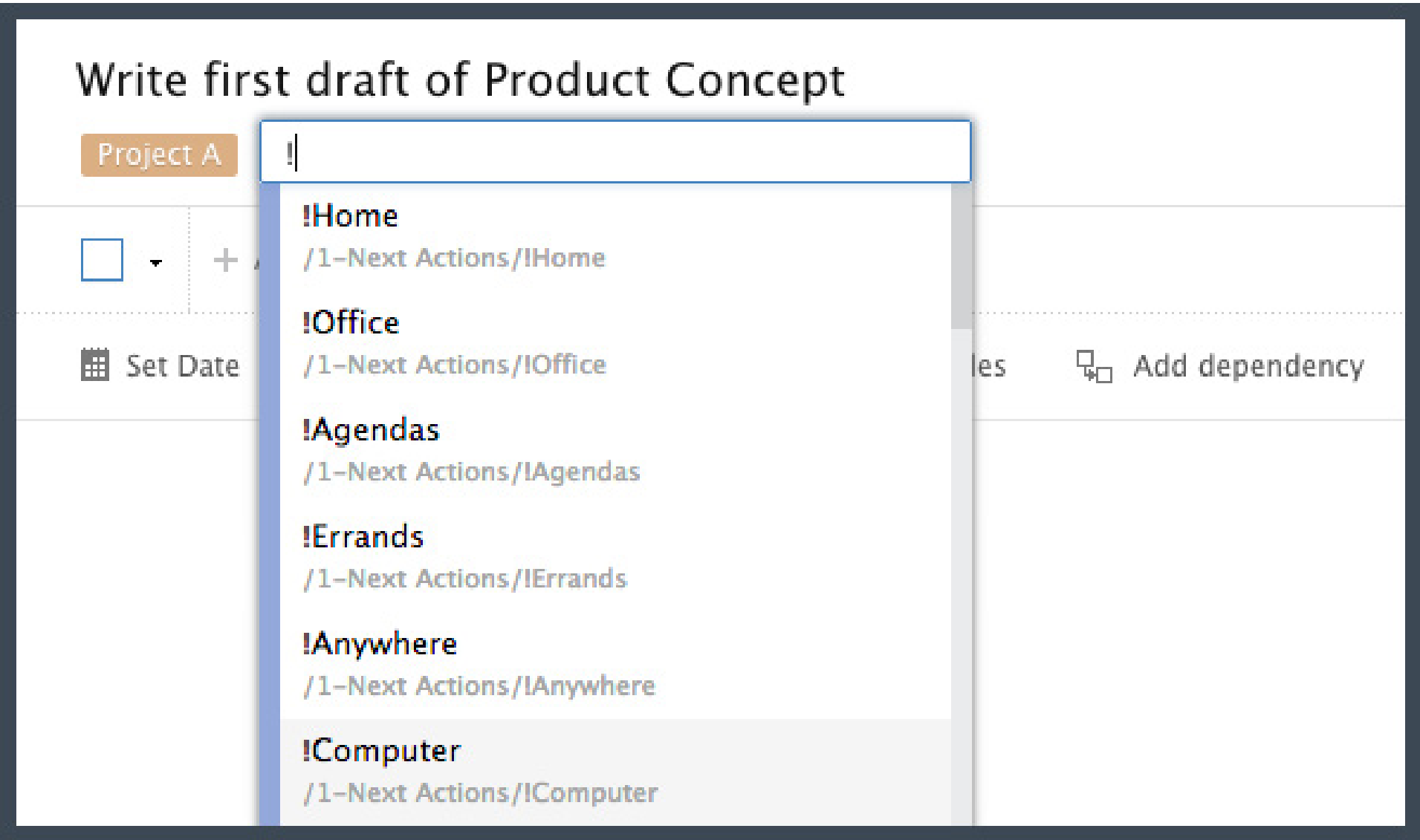4– Remind Me Later

5– Lists

6– Archive

If you like this example, you can [download this template](#) and import it to your Wrike workspace.

Once you've set up your preferred folder structure, you can easily drag and drop tasks out of your Inbox and into the relevant Context folder. You can also store the same task in multiple folders. So the task "Browse Pinterest for gift ideas" can be included in both the "Computer" context and the "Buy Mom a Birthday Gift for Saturday" project folder.

# Tip:

By preceding all Contexts with the same symbol or letter (in this example we used the exclamation point) it's easier to organize and quickly find your most-used Folders within the task view.

## Write first draft of Product Concept

Project A | !

!Home
/1–Next Actions/!Home

!Office
/1–Next Actions/!Office

!Agendas
/1–Next Actions/!Agendas

!Errands
/1–Next Actions/!Errands

!Anywhere
/1–Next Actions/!Anywhere

!Computer
/1–Next Actions/!Computer

☐ ▾ + | Set Date ... les ... Add dependency

# Step 4. Reflect: Review Frequently

Consult or review your lists as frequently as you need, as long as you follow one rule suggested by David Allen: the Weekly Review. Each week you should set aside a few minutes to reflect, update, and clean out your lists — and your brain.

With Wrike, reviewing tasklists is a piece of cake. You can view your tasks by Context, Project, Due Date, or whichever category suits you best. You'll also receive an email digest to remind you of upcoming due dates. (You can set the frequency of your email digests, or turn them off altogether if you wish.) Or, keep your favorite Contexts and high-priority projects easily accessible by creating custom widgets on your Dashboard.

If you're an Android user, take advantage of the ability to create Home Screen Widgets. Select the folders you want to see on your phone's home screen to keep an eye on important folders without opening the Wrike app!
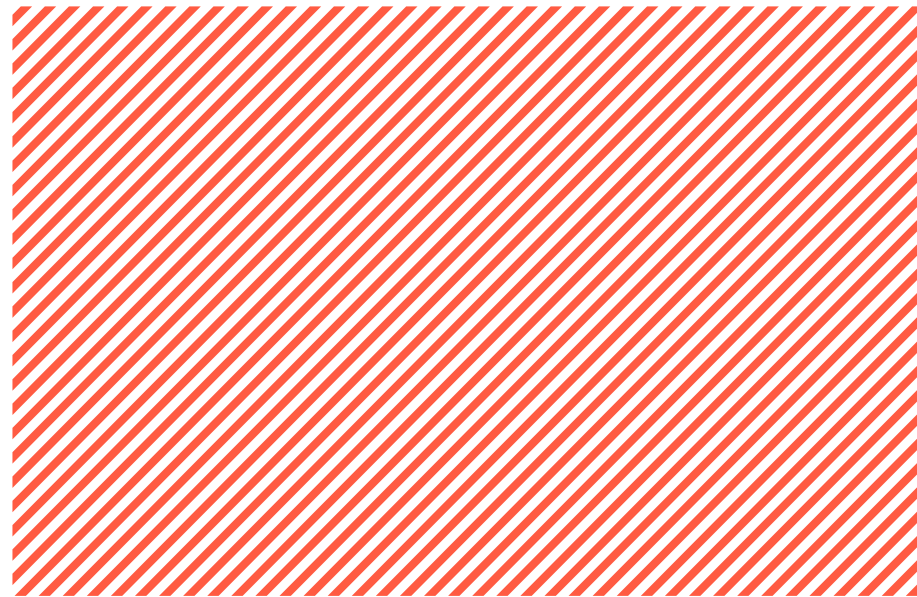
# Step 5. Engage: Use Your System to Get Things Done



The last 4 steps have been all about defining the work to be done (or ignored). Now, it's time for action! When you execute each task, mark it complete. You can do this with a single click on your browser workspace, or with a finger swipe on your smartphone. That feeling of accomplishment has never come so easy!

**And that's it! If you're new to GTD, it may seem like a lot of change. But when you start to notice how much clarity you have into what needs to get done and your stress levels start falling, you'll soon wonder how you ever survived without it.**

For more information on how to use Wrike for GTD, take a look at the article How to Set Up GTD Using Wrike, or watch this how-to video.