Evernote®: The unofficial guide to capturing everything and getting things done.

2nd Edition

By Daniel E. Gold

Evernote®: The unofficial guide to capturing everything and getting things done.

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Acknowledgments

This is awesome. No, really – this is *awesome*. This eBook is about ***you***. It's because of ***you***. It is inspired by everyone who has ever commented on my posts, tweeted with me, or had a substantive exchange with me on Google+. You've all inspired me. You're the reason for this eBook and have provided me with unbelievable motivation. It is my sincerest of hopes that I can give back to you some sliver of inspiration that you all have given to me. So, my thanks to ***you***!

I also want to extend a very gracious thank you to my editor, Michelle Johnson. She did an amazing job fixing my grammatical errors and turning the PDF version into both Amazon and Barnes & Noble formatted eBooks.

This eBook is dedicated to the love of my life – my wife. My number one fan. My biggest supporter. My best friend.

Prologue

The purpose of this eBook is to help your mind relax, allow you to breathe easier, and allow you to become more productive by being able to make better decisions by using Evernote® to help give you back control and become more productive by implementing best practices tied to the wildly popular Getting Things Done® (*GTD*®) methodology, which was developed by The David Allen Company™.

Why I am I qualified to write this eBook? Well, I don't work for Evernote. I'm just a former practicing lawyer turned consultant for a global company for the largest law firms in the country. My passions include blogging about productivity on the side and helping people turn boring presentations into awesome works of art. My most important jobs though include being a husband and a father. I've used Evernote since 2008, and I've been implementing the Getting Things Done methodology since 2007. Between all my roles and responsibilities, I've leveraged Evernote to help me juggle my many roles to lead a successful life – one in which I strive every day to have balance and a *mind like water*™.

About the 2nd Edition

It goes without saying that I am deeply humbled by the outpouring of support and encouragement I have received, quite literally, from thousands of people, which likely include each of you right now. I have learned so much from each of you about what must go right in the first update, what you would like to see more of, and everything in between. While I may not have captured everything, there are **30 pages** added in this update.

Here is a sampling of what has been added in this first update.

1) More screenshots
2) Additional explanation of Today vs. Next tags
3) Additional explanation of contexts
4) How you email notes to Evernote
5) What you do with emailed notes as tasks
6) More explanation on the Area of Responsibility tags
7) Further explanation of parent/child tasks
8) More information on the weekly review
9) **The "Master Note" series! (I am personally very excited about this addition!) More on this below!**
    a. The Master Project Note
    b. The Master Meeting Agenda
    c. The Master Travel Itinerary
    d. The Master Next Action Note
    e. The Master Client Note
10) **An Appendix with downloadable templates!**

Introduction

In 2007, I learned about a book that was taking on a cult–like following when it comes to getting more organized. I admit it – I needed something that would help. But how was this book any different than any other self–help book on the market? From everything I read online, I would be a fool *not* to buy the book. I'm certain you guessed it by now; the book is called Getting Things Done, by David Allen.

Let me just say that this incredibly logical book rocked the very essence of who I am, what I do, and how I manage myself in both my ever increasingly complex job, at home, and everywhere else in between. It crushed my assumptions of how to manage my life. I reorganized my entire life – and to my wife's dismay, I even reorganized her filing cabinet!

The idea behind the book is simple at its core: (1) make substantive lists of all the things you need to do broken down by where you are and organized by your areas of focus and responsibilities; (2) review these lists weekly to gain better control; and (3) put your date–specific commitments in your calendar. The practical application of this otherwise simple and logical system has caused the Internet blogs, forums, and social networking sites to light up like a switchboard.

The unlikely result of David Allen's book is a monetized space that had been likely struggling for years. Think about it for a moment – prior to the book, all you really had was Franklin Covey and Day Timer. Developers have seized new technologies to generate revenue streams in a big way. The iPhone, Android, HTML5, and other emerging technologies breathed new life into a lagging category. Of all the irony, organizations are even making money in selling "analog" systems (read: pens and notebooks) simply to sell to a segment of the market who decided to steer away from the proliferation of productivity apps! Think about the unbelievable marketing efforts tied to Moleskine, Field Notes, and even several other journals popping up at Barnes & Noble and Target that have the same look and "feel" of a genuine Moleskine.

The bigger question to ask here though is "why?" Why are so many people investing their time and money in these kinds of apps? Why would people redo their task lists just to play with a new app? Why tinker with things like tags, folders, categories, assigning, sharing, workspaces, et cetera? Why is there this infatuation with customization of task lists and integration among apps? That's what we are about to explore.

What this eBook won't do though is give you a step–by–step tutorial on how to use specific features in Evernote. The company does a great job of that on their Knowledge Base. While I will do some deep dives into some functionality, the specific focus here will be how to be more productive, efficient, and gain more control in your life by being able to truly capture everything and get things done by leveraging many of these specific features within Evernote.

Chapter 1: Hungry for the Solution.

The answer to our thirst for the "right app" has everything to do with what lies in our hands – our mobile phones. We have the ability to connect and stay connected in ways that were only seen in comic strips and sci–fi movies. Our entire office can literally be on our iPhone, Android phone, iPad, tablet, or laptop. We are no longer subject to looking for wifi signals because we have advanced wireless networks. The excuse that the file is in our office or at home no longer holds water. We can do anything in our car or at the beach that we could do in our office. It is possible.

This presents us with a double–edged sword: on the one hand, it is amazing to have everything quite literally at your fingertips. On the other, we quite simply don't know how to disconnect and we get bombarded with information overload. That is because information is flowing in overdrive. As a result, we are on a constant quest to keep it under control. Tame information like a wild beast. With so many developers testifying that they can make our lives easier, we naturally crave control. We crave simplicity in a world that is now far from simple. We crave what Buddhists have had for thousands of years: balance and a mind like water. It's not surprising then that everyone I have encountered on my blog, Google+, Twitter, Facebook, and countless blogs and forums all have the same issue – we are all hungry for a solution.

The challenge is simple: with all of the information overload we receive in our inboxes – both physical and digital – how do we get things done in a predictable, efficient, and understandable manner? It is not easy, and so, we tweak. We tinker. We “hack” the apps that are out there. We “hack” our Moleskine to conform to how we believe we can manage the multiple inputs coming at us faster than an Olympic runner. When I became heavily involved in this GTD space, I was somewhat relieved and delighted in some measure to know that I was not the only one that has played and tweaked with almost every single GTD tool out there to help me.

If you’re reading this, you’ll empathize where I’ve been over the last four years in perfecting a system. After reading the book, I quite literally setup 43 folders and bought a half–dozen Moleskine notebooks. I read blogs all over the Internet about how folks were customizing or “hacking” their Moleskine. You may have even seen some of the blogs that show you how to divide the Moleskine in half – the first half are your contexts and project lists. If you flip the book and start from the other end, it will serve as your inbox or dumping ground where you would eventually take everything and add it to the first part of the book. In theory, this is great and many people subscribe to this Moleskine hackery. The downside of course, if you are a mobile person, is that there are no real ways to search for critical information exactly when you need it and where it’s needed. The additional downside is if it is lost or stolen … well, you’ve lost precious information in your life. Unlike a credit card, you can’t just get a new one issued and sent overnight.

The problem I found with the GTD methodology is that while it explains how to set up your system, it’s not really an instruction manual the way so many would want. In other words, we’re told we need to create lists based on contexts, then create project lists, and finally life goals. Afterward, we’re supposed to organize all of these lists and create “next actions.”

Anything that is not actionable should be archived, while others end up in "waiting for" and "someday/maybe" lists. At its core, it is simple enough. But in practice, we all want to mold existing electronic systems to flow the way we all believe they should. This of course reinforces what I have said so often – GTD is personal. No doubt, this explains the reason why ***I always find that through tinkering with other systems, I perfect my own.***

Productivity App Overload

The proliferation of apps in this space has caused some form of "App Attention Disorder". I haven't come across anyone through my social networks who has really stayed with one app for any longer than a year. True, there's some "fun" to it, but it takes away from something very important that we are supposed to be doing … and that is the *doing*.

There are so many apps out there to help you get organized that you can literally spend more time searching and setting up your so–called perfect setup that you will actually be spending less time getting things done. In some fashion, GTD had made my life *more* complicated.

My first soiree into the digital GTD space was Remember the Milk. After spending an inordinate amount of time trying to make it work for me – and paying the subscription – I left it for Toodledo. Unfortunately, Toodledo (at that time) proved to be more of a time drain than RTM. I spent hours tweaking with the columns, customizing the information, and after paying that subscription amount, I gave up on that one as well. Then came along Nozbe. I was intrigued mainly because of its core integration with Evernote – the real meat of this eBook. I have all of the admiration in the world for Michael Sliwinksi and, in fact, have even interviewed him for my blog. He's got a great forward thinking strategy for his business. Unfortunately, I didn't think that every task was a project and just couldn't extend the mental energy needed to make it work.

From there, it was a descent into GTD app hell. I tried GTDAgenda, Hi–Task, GQueues, Todoist, Do.it, Task.fm, Producteev, NirvanaHQ, Wunderlist, and even Springpad. What I was finding was that none of these apps worked the way I did. None of them were the right "fit" for me. I tried, but it was a constant source of friction for me. The result for me was an epiphany of sorts: Keep it simple and stick with what has been always working for all my reference notes: Evernote.

Chapter 2: In walks the Elephant.

Evernote is more than an app. ***Evernote is a life management tool.*** It is used by millions across the world to *remember everything*™. Capture everything. It captures all of our senses except for smell. Every moment. Every brainstorm. Everything we hear. Everything we see. There are hundreds of use cases – and it is used by chefs, teachers, lawyers, doctors, civil engineers, entrepreneurs, stay–at–home moms – everyone. It captures notes in every form: on our phones, tablets, PC's, and on the web. It's extraordinary. CEO, Phil Libin, is in fact building a 100 year company.

I have been using Evernote since October of 2008, when I created my very first note. Previous to Evernote, I begged my IT people to provide me with a license to Microsoft OneNote because I said it would make me far more productive at work and in meetings. As cool as OneNote is, there were several downsides. The biggest: it stayed on my laptop. Since I could not bring it with me to a meeting (Steve Jobs hadn't invented the iPad yet), I was relegated to my legal pad or Moleskine. Therefore, I could not have it with me every time I thought of a new idea for a project, a brainstorm, etc. It remained solely on my laptop. The downside to any application that resides solely on your desktop is that it limits the flow of creativity wherever the creative spark may ignite.

When I learned about Evernote, I saw tremendous benefits. I was not certain how exactly I would use it, but I knew there was great potential and that I would be sticking with this one for awhile. My first step was to export all of my notes from OneNote and import them directly into Evernote. Like a mad scientist, I began brewing up all types of ways I would leverage this tool. One of the immediate benefits that called out to me was its simplicity. The irony of course is that through its simplicity, scores of bloggers have shown how easy it is to overcomplicate the tool with scripting templates and tedious saved searching.

Perhaps it's my background as an attorney, but I subscribe to the theory that if it takes me more than 30 seconds to understand how to use a program, I'm done. I don't have the time or the energy to truly "figure out" a program. It needs to be simple enough for me to comprehend, but not too simplistic that it lacks core functionality to enable me to be more productive.

Of course, I'm the biggest hypocrite though because I began to read dozens of blog posts and forums on how to set up Evernote as your one and only GTD resource for tasks and reference folders; everything from managing Evernote with just one notebook to using just notebooks and no tags at all. Then, it occurred to me that Evernote was becoming ever so un–useful to me. I did what those scores of bloggers did and made it too complicated for even myself. I created so many tags and I was trying to figure out why. I kept tagging and making new tags and I felt no real sense of understanding why I had the tags I did.

I created parent and child tags; with the parent tags mirroring the notebook of the same name so I knew which tags were associated with that notebook. I was destroying the very beauty within Evernote by over–complicating everything. It was through these misfortunes, trial and error, and multiple iterations of my setups that I can truly assist you in reaching that level of Zen to allow you to capture everything and get things done.

Getting Started in Evernote

Getting started is incredibly simple. Just ask yourself this one question: what am I trying to accomplish? Understanding what few things must absolutely go right in order for you to be successful in managing your life will help you organize Evernote correctly. Remember, the goal here is to be able to mimic what you are currently doing at work, home, for your next book, school, or whatever it might be.

Are you using a notebook, legal pads, a journal, sticky notes, spreadsheets, Word docs, or just email to get things done? Do you have several layers of nested folders in *My Documents*? Think about all the possibly disconnected ways you are doing it right now and then take a step back. How many times did you wish you had that piece of paper, that Word doc, or that file in one of those nested folders while you are out of the house or out of the office or in the classroom? With Evernote, you can streamline every one of these disconnected, yet critical, pieces of information into one location.

The best part? It starts with a blank slate. It is as simple as starting a note. In many ways, that's the irony of it all. The tool can be as complicated or as easy as you want it to be – and it all starts with just a new note. But what do you begin with on this new note? It sort of feels like writing your first eBook and being presented with a blank screen and a zillion thoughts racing through your head.

Here are some ideas to get you started: all of those sticky notes, loose pieces of paper, bar napkins with revolutionary ideas jotted down, legal pads, and notebooks can all be transferred to Evernote with your phone's camera. You can snap your pictures or scan those loose pieces of paper into a new note and then because of Evernote's built–in text recognition software, you can search your own handwriting. I'm not one of those people that really need to understand the technology behind it – all I need to know is that it works – and with neat enough handwriting, it really does!

Notes can be just a photo of a set location for a photo shoot, places to build your next restaurant, an accident scene, expense receipts, photos documenting an insurance issue with your house or car, exhibits for a trial, where you left your car, restaurants you want to frequent, a favorite wine or beer, a photographic to–do list for the husband that needs pictures of the products he needs to pick up at the store (not that I needed that or anything).

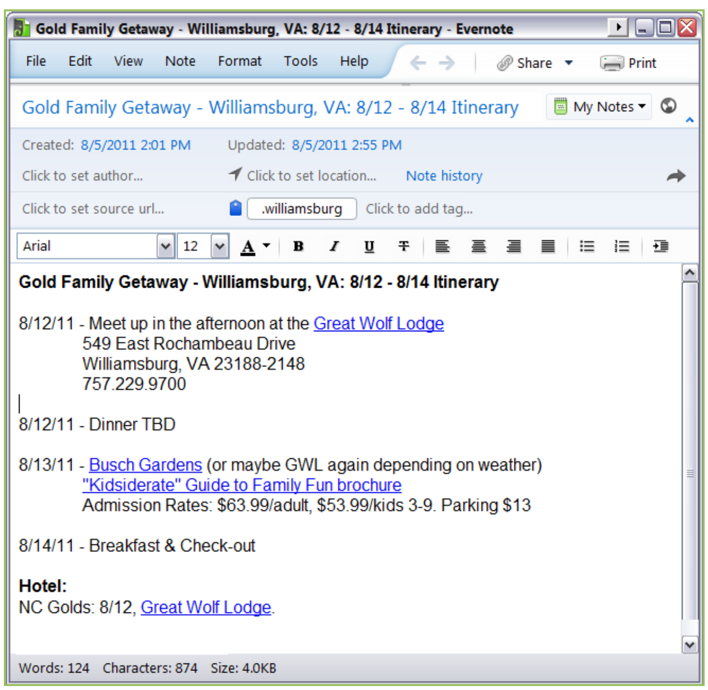
Notes can be your professor's lecture, your latest brainstorm you recorded while you were walking down the street, or scanned manuals, warranties, medical invoices, receipts for electronics, etc. Perhaps one of my personal favorites is creating notes of all of your children's artwork!

With the built–in web clipper in all of the browsers, notes can be product research. Let's say you're in the market for a new Tablet. You can highlight portions of a blog, reviews, or an entire page and clip it, tag it, make any annotations you want, and send it right over to Evernote.

I've used web clippings to prepare for presentations I've given to a room full of litigators. I researched cases, highlighted, and sent them to Evernote to then put into PowerPoint when I was ready to assemble it all together. Web clippings are an invaluable way to do critical research for anything ranging from a term paper, business review, presentation, buying something new, and the most fun of all – vacations.

The Master Travel Itinerary Note

Staying organized while you travel is critical. Creating what I like to call the **Master Travel Itinerary ("MTI")** note allows you to implement the power of offline access (or 3G/WIFI if you have it) and **copy note linking**. You will see that I employ note linking in many different scenarios throughout this eBook. Why? Because it happens to be one of



the single most effective tools that will allow you to look practical, polished, and organized no matter the scenario. Let me give you a perfect example of how to use Evernote for planning your vacation. We were recently planning a vacation to Williamsburg, Virginia as it was the half–way point between us and my parents.

After my wife did all the research, I plugged everything into Evernote. I clipped information on the hotel, the amusement park, restaurants we'd go to, and even directions for my parents from their house to the hotel. Then, in one note, I created an itinerary for them, with hyperlinks to each of these notes. It was beautifully laid out and easy enough for them to understand.

The Master Meeting Agenda

I've also leveraged Evernote for a group of meetings I had one day during my weekly travel. First, I created a note with my high level itinerary. This included all of my appointments, where I was going to lunch, dinner, who the caterer may be for my presentation, and my flight times. Second, by leveraging the power of **note linking**, every item in my itinerary contained a hyperlink to information on that restaurant, flight confirmations, and for each meeting, would link me to a note I made for the itinerary for that particular meeting.

The **Master Meeting Agenda or "MMA"** allows you to have even greater organization and focus at your next meeting. The secret sauce here is two things: 1) having either WIFI/3G access or offline notebooks (more on this below); and 2) copy note linking. Before I walk into any meeting, I want to be sure I've done my homework. What are the few things I want to be sure I bring up during my meeting? What questions do I want to ask? What supporting materials do I need to have to help me ask the right questions? Here's how to make the MMA work for you.

First, create a new note and title it as the name of your meeting. You can decide not to tag it, or tag it as the name of your meeting or the city you are visiting, etc. If you do have offline access, I suggest either creating a new notebook or include it as part of a client notebook that already exists. If you choose the first approach, you would be putting both your supporting materials and the MMA in this one notebook.

Next, list all of the questions you want to ask. Now, here is where the fun part begins. Search through all of your notebooks to find all of the supporting material that you'll need for the meeting. Copy those note links for each of those notes, and then go back into your MMA and paste those hyperlinks in the appropriate locations. For example, let's say I have a question about a contract renewal I have with my client. I can copy the note link of the note that contains the PDF of the contract I need to reference. In the MMA, I can highlight the part of my question that references the contract, right click, insert the note link hyperlink, and then magically, I can immediately reference that note during my meeting!

I would list the top 3 things I wanted to review at my meeting, any questions I had, and any reference items. For the reference items, I would again link to any notes within Evernote I wanted to reference such as a contract, a literature piece, or even a spreadsheet.

Let me tell you how this played out for me at this one particular meeting. I wanted to showcase a customer's video testimonial I had on one of our products. That video was a note in Evernote. When it got to the appropriate place at our meeting to discuss this video, I simply clicked on the link on my iPad, that note opened where the video was, and I hit play in full screen. This was an incredible display of how to collect, process, organize, review and do. Take a look at the screen shots below.

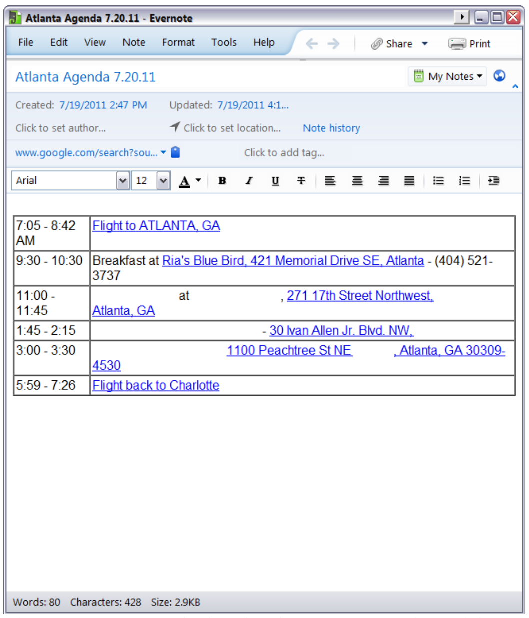


Figure 1: My Agenda for the day. Names redacted for privacy purposes.

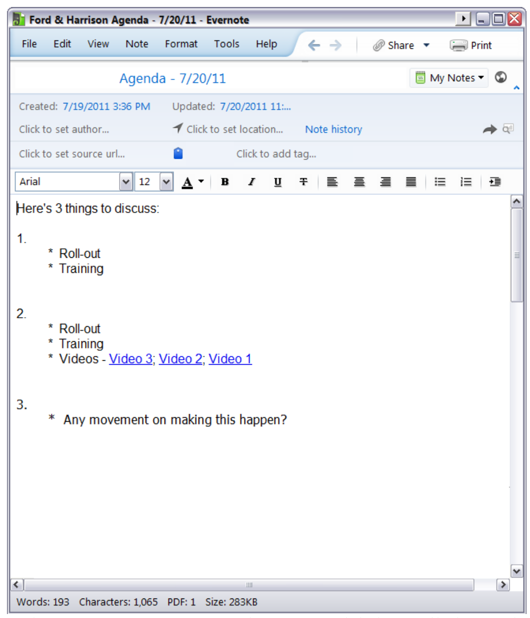


Figure 2: My 11:00 appointment with hyperlinks to the videos & a PDF proposal I wanted to present.

And of course, notes can be created for every task that needsto be implemented into your GTD workflow!

Chapter 3: Implementing GTD in Evernote

If you're not familiar with the ground breaking book called *Getting Things Done* by David Allen, don't fret – but buy the book! Although I'll explain a bit about it, don't worry if you already know the methodology well, as I won't be doing a book report here. Before I bought the book, I actually tried for a couple of months applying principles that I read online in many blogs, but I realized I was exerting too much effort when I should probably just read the book. So, if you haven't yet – buy the book! It is, as noted above, a handbook for being more productive and successful in life, but *not* the manual to how to go about achieving this in any particular application.

As I stated in the introduction, the basic premise is actually quite simple: make substantive lists of all the things you need to do broken down by where you are and organized by the areas of focus and responsibilities, review these lists weekly to gain better control, and put your commitments with specific dates in your calendar. Of course, if it really were that easy, the Internet would not be buzzing with forums and blogs, and app developers wouldn't be making money on developing new ways on how to implement GTD.

I'll first review my struggle a bit and then explain how I have implemented the GTD Phases of Workflow in Evernote. The 5 Phases of Workflow that David Allen discusses are: Collect, Process, Organize, Review and Do – which is also referred to as the horizontal focus.

But there is also a less talked about area in the GTD methodology, and that is known as the vertical horizons of focus. The book defines this as really the upper level thinking of managing your life. For instance, there are the following areas:

- 10,000 Feet – This is your project list (more on this below)
- 20,000 Feet – Current job responsibilities – this includes both professional and personal. For example, I'm a husband, father, consultant, blogger, etc. These are all of the areas of responsibilities and goals you've set out for yourself. Here, you would create lists of goals for each role.
- 30,000 to 50,000 Feet – as you get higher in altitude, the focus is more on two–year, three to five year goals, and life goals. In essence, ultimately defining your life purpose.

This higher level of thinking and planning is not often done because it is so much easier to stay focused on what we can control – the here and present, our "runway" list of tasks we need to accomplish and our project lists. Just the thought can sometimes be daunting. Asking "why do I exist," "what's my purpose in life," "my purpose in my organization," or my "goal with my family" are not easy questions to answer.

I remarked once on my blog that perhaps one of the reasons we choose to ignore these important questions is because we may be afraid to answer them. What if we don't have an answer? Does that make us odd? Are we not educated enough or disciplined enough to answer it? What do we want out of life? If you have a career – what are your aspirations within your organization? Do you have one? Is there a vision? Have you mapped out every step in order to get to that place where you want to be with your career and your family? Just thinking about these questions can be stressful. It's the unknown that scares most of us.

Tara Rodden Robinson, the "Productivity Maven," had an incredibly insightful post called "Have you met the Real You?" I was definitely touched by her post because she scratches that itch we try to ignore – finding our Genuine. She says that once you actually peel back the layers and layers of protective clothing that we put on to protect our real selves, we'll get pretty stubborn and will want to go back to the way things were. In her post, The Unanswered Question: a Reply, she wrote out some really great ways of finding our "genuine" or our real selves. She talks about how the power of daydreaming (seriously!) can help you focus on these upper levels of managing your life.

> *While it's sometimes hard to think about dying and not being here anymore, the truth is that all of us will pass on. The "big why" can be thought of, then, as what lives on after you. It's your contribution to future generations. That might be in the lives of your children, in the causes you supported, or in some legacy you leave behind. By thinking of 50K this way, it can be more easily tied to the "next action" thinking because it gives you a clear path to doing something right now, from making a loan on Kiva to setting aside some father–kid time that will be special and memorable for you both. Your investment in those relationships are the most important next actions of them all.*

What will be discussed below is harnessing the power of Evernote to help you become more productive in life by creating notes that will help you achieve these goals you set out for yourself. Through understanding how to leverage Evernote better, you can create ticklers for yourself so that you can always go back and look at these goals and metrics you've set for yourself to see if your horizontal focus is in line with your vertical one as well. After all, the entire goal behind the GTD methodology is managing your life; and since Evernote is a life management tool – it is a perfect marriage for creating, managing, and getting things done. With that said, let's talk about how to start managing your life better by implementing the 5 Phases of GTD Workflow in Evernote.

Implementing the 5 Phases of GTD Workflow

Collect

I hardly doubt that collection is a problem for any of us. We're always collecting information. It comes from everywhere: e–mail, Twitter, Facebook, Google+, RSS feeds, physical e–mail, documents, spreadsheets, presentations, et cetera. The question is how do you appropriately collect all of this information? While we have multiple inputs shooting at us throughout the day, it is important to look at the most critical ones. Then, you should decide how you're going to ultimately process & organize them. For purposes of this eBook, we'll focus on two of the most common ones: e–mail and documents.

E–mails

Controlling e–mails is one of the most difficult challenges for any person. Although we receive scores of e–mails every day, many of those are probably irrelevant. This becomes a problem because the messages fill up our e–mail inbox so much that it becomes very difficult to see the trees – and all we see is a densely packed forest.

Just this morning, in fact, I received a read notification of an e–mail I had sent to a former client 2 years ago! My feelings aren't hurt at all – in fact, I feel badly for him. I feel badly that he has such little control over his inbox, which is ironic given that he's a librarian. But this is indicative of a much bigger problem. How do we control the influx of e–mails?

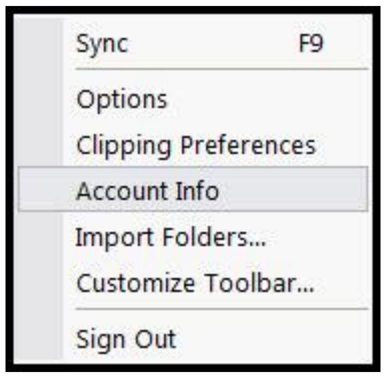
Merlin Mann fundamentally changed my thinking of how to manage e–mails just about the same time that I read David Allen's book. He said we should all subscribe to Inbox Zero; that is, getting your inbox down to zero if not every day, every week. To many, that seems like an impossible task. At first, it really does seem impossible. But as you begin processing (see below), you'll feel much more liberated. You've freed yourself from this overwhelming burden that has been resting on your shoulders. Even if it takes you an entire weekend to plow through, get your inbox down to zero. Moving forward, it becomes so much less daunting because you are controlling the inbox – as opposed to the inbox controlling you.

Now that I have my inbox under control, I process e–mails down to zero almost every day. It's a bear, but once you get going and can actually dump that "psychic RAM" a full e–mail inbox takes up, you'll want that feeling every day.

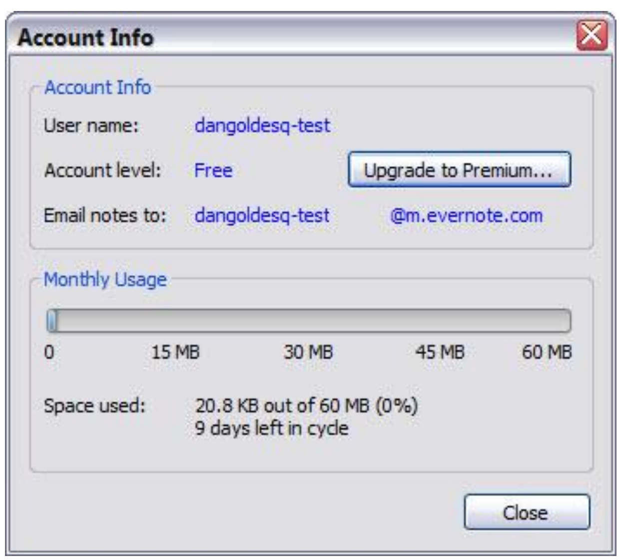
My methodology very much employs the 5 phases. First, I either **do** something with that e–mail right then and there because it'll take less than 2 minutes, or I simply click on the "Send to Evernote" button on my Outlook ribbon and send it to Evernote with an actionable subject line for me to process later. If it is not actionable, I'll either archive it in Outlook or Gmail, delete it (perhaps one of the most cathartic feelings ever), or send it to Evernote and associate it with a particular project or as a valuable reference note I may need later.

But after you forward your email message into Evernote either through the Outlook ribbon or your "Evernote email address", what do you do with the original? Not surprisingly, this is one of the number one questions I have been asked since the first release of this eBook.

If you are unsure of where your Evernote email address is, if you go to your toolbar, and select "Tools", click on "Account Info".



Then you will see that there is something that says, "Email notes to". That email address is how you email into Evernote. My recommendation would be to add that to your Address book.



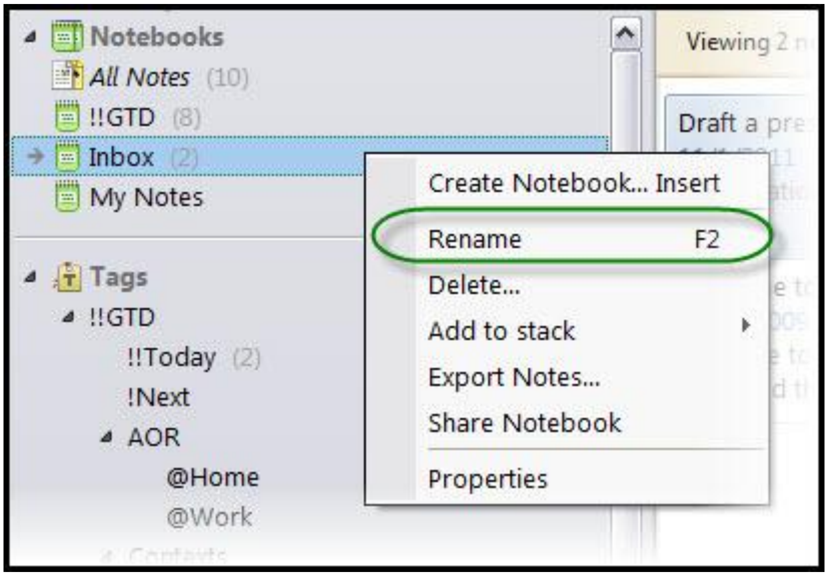
Here is how I usually handle email:

1) Forward the email to Evernote with your unique Evernote e-mail address. (If you do not know where it is, you can access it by going to the toolbar, selecting Tools and then Account Info.) Once in Evernote, insert a checkbox and then give this email an action item name, such as "Draft a proposal for ABC Company." Then, if you like, you can either hit enter a couple of times or insert a horizontal line to separate the task from the e-mail you have forwarded. Finally, assign it a context and a project related tag, if appropriate.

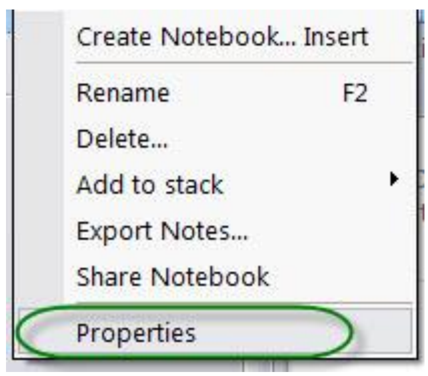
2) When I am ready to take action on the note, I'll copy the text of the original email in the task note in Evernote and just paste it into a new email. Your other option is to create a GTD label in Gmail or a separate folder in Outlook and archive that email so that is out of your inbox. When you're ready to take action on the note, just go to that label or the folder! Importantly, in either case, you're getting it out of you inbox!

3) . After you've completed the action, you have a couple of choices: 1) delete the note or simply check the box and then move it into your Archive or Client Notebook!

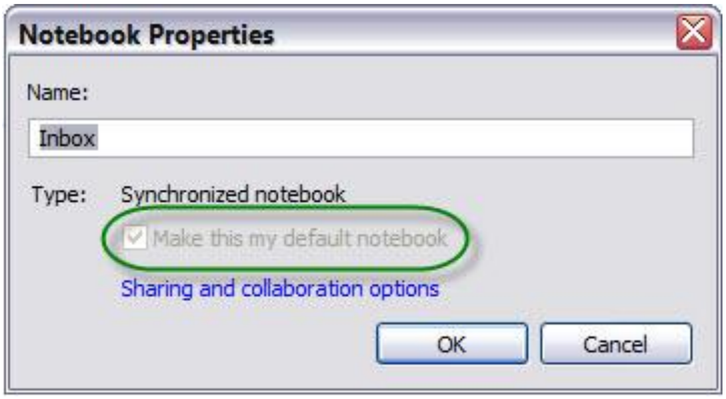
If you are reading this and do not see an "Inbox" notebook, do not panic! I renamed the default notebook to Inbox. If you are unfamiliar with how to create a notebook named "Inbox" and make it your default, the screen captures below will aid you in this important step.



First, you will want to right-click on the notebook you want to change. Then, select Rename and call it Inbox.



Then, right-click on the notebook again and now select Properties. Once you do, you will see that you can place a check mark next to the option that reads, “Make this my default notebook.”



Paper & E–Documents (Spreadsheets, Presentations, PDFs & More!)

I love to share my Evernote notes with colleagues, friends, and even my wife. Sharing with Evernote is critical and is the one thing that has helped differentiate how I do things versus how my colleagues do things. You see, it goes beyond just organizing your own life. Once you leverage the ability to share in Evernote, you can help make other people's lives easier as well. You can share singular notes, such as meeting agendas, travel itineraries, customer facing PDFs, presentations, photos of set designs, food or wine, restaurants, whiteboard design ideas with your thoughts, and much more. If you share an entire notebook, you can collaborate with others on projects. If you are both Premium members, you can not only view but edit notes as well. It is truly the ultimate collaboration tool.

I'll often drag over to Evernote any Excel spreadsheets, PowerPoint presentations, customer–facing literature, and even audio and video files I need to reference later or act upon. If I'm in a rush, I'll simply bring these over to the Evernote Inbox first and then decide what to do with it later (see "**review**" below).

While this may seem easy to do for electronic documents, how do you do it for paper documents? Simple – after reading many reviews, I finally gave in and bought myself a Fujitsu ScanSnap S1100. I'm in love with this little guy and I'll never go back. Outside of how wonderfully sleek and beautiful it is, and that it is portable and can go with me on my weekly travels, it is also seamlessly integrated with Evernote. It scans **super fast** and with one click you've created a new note.

Even though I already own a Multi–Function Printer, nothing beats the ScanSnap! Because of it, I've gone almost completely paperless. Using it is simple – just install the software and hook it up to your computer. You can scan business cards, ID's, and paper. It literally takes seconds and you can keep feeding it paper! When you're done, you get a prompt to send it right over to Evernote as either a JPG or a PDF. It also comes with other interesting software, but I just use it with Evernote. In fact, I've setup my options so that it automatically creates a new note in JPG format.

The advantage of it being a JPG is that Evernote has image text recognition and so it will find the words immediately (being a Premium user provides you with priority image recognition). While it can search words in a PDF document if you are a Premium user, it will not go to the exact word; rather it will only let you know that the word is there in the document. PDFs are very helpful for big documents of course, but for everything else like contracts, expense receipts, invoices, etc – it all gets scanned in as a JPG into a new note.

Many of the items I scan include:

- Expense receipts: These were always the biggest thorn in my side. I'd have a ton of receipts all crammed in the back pocket of my suit to scan using my bulky multi–function printer when I got back to my home office. It was always such a bear of a task. I even took pictures of my receipts and put them in Evernote for some time, but using the ScanSnap is quick, fast, and fun! (If submitting expense reports could be fun, of course.)
- Manuals, invoices, car repairs, landscaping company, exterminator, painter, etc. You name it – if it is something I want to reference at another point, I'll scan and then organize.
- Brainstorming: When I'm on the fly, I'll hit the microphone button on my Android and quickly dictate a note. By leveraging Quicktate, it will transcribe my note for me. Then, when I process my inbox and organize, I'll see my transcribed note and decide where it should go – i.e., is it a task or something that should be filed away.
- When I'm at my desk, and I come up with some thoughts about a blog post, my upcoming anniversary, a task I need to do, or just about anything – it all ends up in the inbox for me to process and organize later.

- Action items: This is the biggie. Every actionable item becomes a new note in Evernote. When I do a brain dump of everything that is on my mind either first thing in the morning or later in the evening, I'll just keep creating notes one–by–one. When I'm ready to process and organize, I'll then add the associated context & project tags (if applicable).

Process

Once I've collected all of my e–mails that are either actionable or are for reference, my electronic documents, paper documents I've scanned, web clippings, photos, et cetera, I'll throw them all into the Evernote Inbox. From there, I devote the time and attention to processing. Processing is hugely important because it allows me to understand what I have, what I need to do with it, and what the next action will be with each item. I decide whether each document or e–mail is a part of a project, is actionable, might be done someday, is just a reference item, or whether I need to create a new project with separate discreet action items. I also look to see if there is anything I've brought into Evernote that really should be deleted.

This is also where I begin asking myself the critical questions that David Allen sets forth: do I **delegate it, do it, defer it, delete it,** or just **incubate it.** I will also ask myself whether the note deserves a "tag" or if I should just throw it into a notebook. As you'll note below, my tags are relegated mainly to my GTD system, clients, and other miscellaneous items.

Organize

This is perhaps my favorite part of my workflow in Evernote. Mainly because I really love to trash non–actionable items that I really don't need! More substantively though, this is where I really begin to flush out what my tasks are, what I'm delegating to others, what needs to go on the calendar, and get a greater understanding of what all my projects are for all of my areas of responsibilities. In essence, this is where I truly feel like I'm emptying my "psychic RAM" and gaining a much clearer idea of my obligations (as well as others), and when I begin to feel more balanced and have a "mind like water".

Tagging your way to GTD success

There always seems to be a question in all of the blogs and forums about whether you tag your notes or if you just put them in a notebook, or maybe do both. I'll lay out for you how I do it, and my rationale, as I have found this method to be successful in helping me get things done. To do so, it's important to understand what tags are at a high level and why they are important.

The easiest way to understand tags is to look at the "analog" world. If you're around my age, you might remember Trapper Keepers. I loved those! Both Trapper Keepers and the big 5–subject tabbed notebooks were perfect because they had tabs. Those tabs separated things, such as subjects or different areas of focus, for one class. These tabbed dividers can be looked at as being digital tags!

Think about when you read David Allen's book – or any other book for that matter. Have you ever found yourself earmarking a page or putting a sticky note by that page? Those earmarks and sticky notes are just like digital tags!

Tags are incredibly helpful for referencing things that are important in a sea of information you might have in Evernote. The question becomes how do you manage what could potentially be an unwieldy number of tags? After all, you can “nest” tags or create “parent/child” tags. In other words, create one main topic tag and then put a list of tags similarly related underneath.

However, it really is critical to plan in advance. The reason is that you can easily overwhelm yourself. Think about this for a moment: How many context tags have you made in your electronic system? How many open tasks do you have? How many times have you dragged over an e–mail and converted it into a task and put it in your long list of tasks? How many project tags have you created? Are you doing the weekly review to close any open loops, review what you’ve done the past week, and ensure your following week is ready to go? How many times have you created a task on the fly and left it in your e–system untagged and unmanaged? How often do you dread looking at your long list of open loops and just get overwhelmed and frustrated? Do you make the time to sort your tasks electronically by context depending upon the time and energy you have in a given moment?

The easiest way is to create this plan in advance. In my one notebook I use to store everything, I leverage the parent/child tag structure for both GTD and my non-actionable notes. The parent level tag structure looks like this:

01. Home

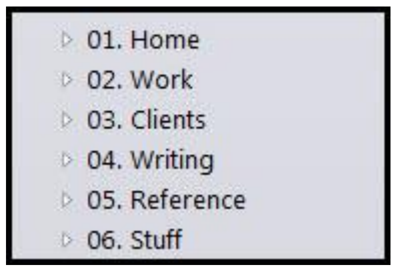
02. Work (internal reference items only)

03. Clients

04. Writing (my blog, eBook projects)

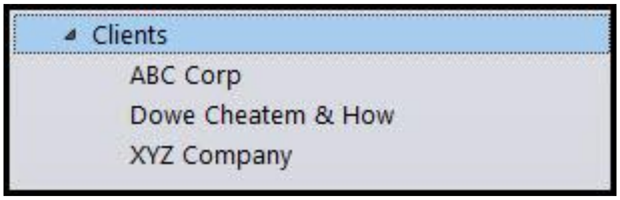
05. Presentations

06. Stuff

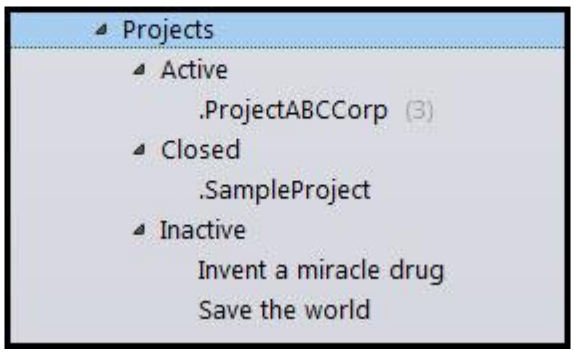


This will obviously be different for you, but within each of these tags, I have high level tags related to each of these areas. For instance, under “Home”, I have things such as house projects or things having to do with the children. Under “Reference”, I include things such as warranties, contracts, etc. Under “Stuff”, I have beers I like, books, music, movies, restaurants, etc. There really isn't a need to tag that much since Evernote has amazing search capabilities. These tags are essentially my digital filing cabinet of important things I need as reference items. The child tags are all those things related to each.

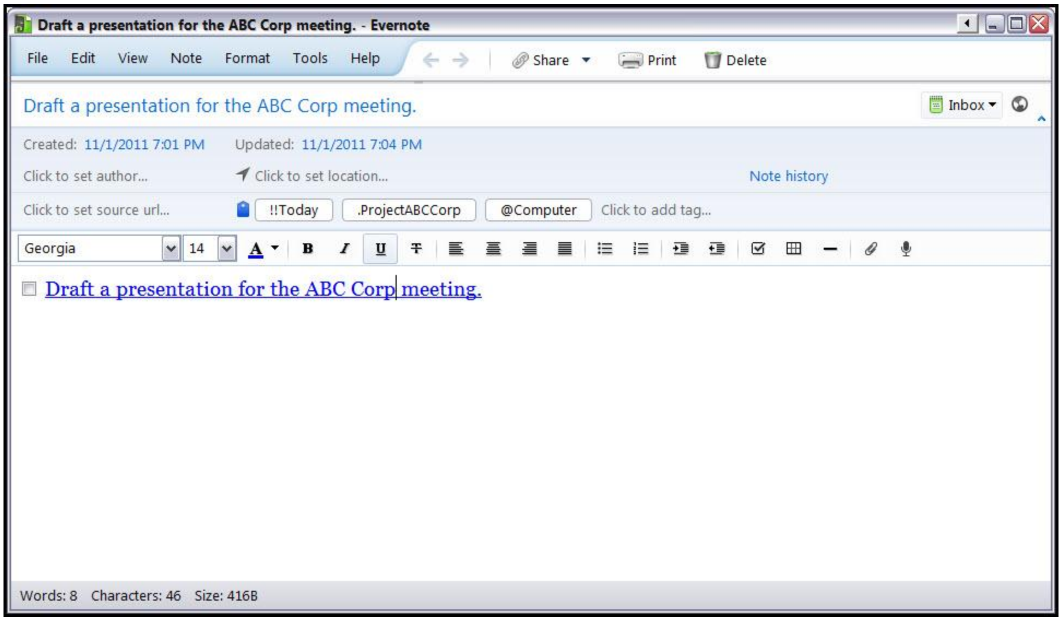
For clients, I have a parent level tag, “Clients”, and I'll include the names of each of my clients as children tags.



For projects though, I have a parent tag called "Projects" that include the child tags, "Active", "Inactive", and "Closed". Each of these in turn has children tags, which are the names of each of the projects.



I tag the relevant reference notes for projects such as .ProjectABCCorp, as you will note in the image below. That ".ProjectABCCorp" tag is in the "Active" parent tag. When I'm done, I simply put my mouse on the project tag, left click and hold down while dragging it to the "Closed" tag.



The next set of tags are organized by the GTD Methodology. The impetus to this system was inspired by both David Ward, attorney and author of Attorney Marketing and Ruud Hein. My top parent tag has the prefix "!!" because it will bubble up to the top this way. Following that, I look at !!Today, !Next, Contexts, and Projects (with children tags: Active and Inactive).

The !!Today tag is for all of your action items that you've assigned yourself for that day. The !Next tag is for all of your Next Actions. !!Today tasks are those that you absolutely must get done today. !!Next are those that you've decided must get done this week during your weekly review. Some might say you can skip this tag, but I think it's helpful, especially if you've got 100 tasks - identifying 30 that absolutely must get done this week and then identifying 3 that must absolutely get done today, adds to a greater sense of calm and organization in your workflow.

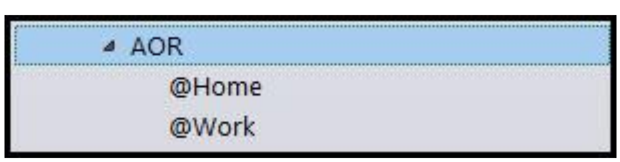
The Contexts tag is a parent tag, and underneath it, I've nested the most simplified list of contexts I believe I need: 1) @call; 2) @e–mail; 3) @pc; and 4) @errands. There are really not many more areas in which a task can be performed. You'll learn more about how I go through this flow in the "**review**" section below.

Your context list might obviously look different; however, the most practical way of doing this is by taking a look at all your tasks and then breaking them down by *where* you can get them done: in the car, on the computer, on the phone, etc. If your action item has a *specific date* on which it is due, then put it on your calendar, not your task list. From there, tackle each of your action items based on time, energy, and priority.

The whole idea is being able to make a decision about what you're going to do based on where you are and what resources you have available. Is this something you need a computer for (do expenses; review spreadsheets, email Bob, etc.)? Is it something that requires a phone call? Do you need to go somewhere to get it done like the grocery store? Each of these are basically categories: @pc, @calls, or at @errands. Does that make more sense? A great example is if I'm in traffic, I can look at my @calls list and bust out some calls to clients. If I'm at the store, I'll look at my @errands list to see what else I should do while I'm out.

For other notes that are not actionable, I generally give it some other relevant Project or Client tag, or I may not even tag the note at all. Since Evernote has such an incredible and robust search engine, you may not even need to tag all of your notes. My rule of thumb is that the simpler the tags, the better. Plus, this helps in providing a much more predictable system once you have decided what your process will be up front.

As an additional thought, you can decide to designate whether the project is for @home or @work. You can see I have created an "AOR" parent level tag or "Area of Responsibility" with @home and @work as children tags. Note, that this is not the same my non-actionable tag called 01. Home, as noted above. This is specifically for designation of whether a project has to do with home versus work related projects and tasks. This can allow you to get a snapshot of just those tasks you need to do at home over the weekend. Again, this is optional for your setup, but a nice best practice.



It is important to remember three things about this kind of tagging structure: 1) **keep it simple**. Don't overcomplicate your approach. 2) If you are tagging a note by the child tag, you *do not* need to also tag it by the parent tag. For example, a parent tag Contexts will have child tags such as @calls, etc. Your task "Call Bob re: the proposal" need only have the @calls tag as the !Contexts tag remains empty and only serves as a place holder for all of your contexts. 3) Not everything needs to be tagged. Leverage saved searches if you need to by doing a search for "Client A" and save that search. If you want to search for open tasks for that client, you can search for "Client A todo:false".

Let me give you an easy example of how I perform, save, and run my saved searches on the PC version of Evernote. The process should be similar on the Mac and mobile devices.

Let's say that If I run a search for "todo:false". This means I want to find any unfinished to-do items. If I enter "tag:@calls", it means I want to find all of those notes in my calls list. Finally, to save this search, click on the magnifying glass or a button that says save search, depending on what version I am using.

When you click that magnify glass, you can name the search. In this case, I named it "@calls". It then confirms the query you just ran.

When you want to run a saved search, you will find your list of saved searches below your tag list. Simply click on the "@calls" saved search, and you will always know what unfinished to-do items you have in your calls list in your GTD notebook.

Keeping it simple helps maximize your "doing" and minimize "fidgeting" with your system. In my case, I have one tag for the context and if it is about a client or a project, I'll give it a tag. For example, let's say my project is to buy a new lawnmower. Well, the action item could be "Research lawnmowers" and my tags would be @computer, .new lawnmower. No more and no less. Keeping it simple allows for you to best manage your system. I'll talk more about this in the "**projects"** section below.

The Master Next Action Note

A lot of people have often asked me if there is a way to create all of their next action items together in one note and still be able to implement the system I've set forth here. The answer is: absolutely. I am going to introduce to you the "**Master Next Action"** note or the "**MNA"**. (This is the first of the Master Notes I've created for you to download. Clicking on the link will allow you to download the note and import into your Evernote notebook!)

The MNA allows you to group all of your Next Actions together for each particular context. For example, you can have a “@calls MNA”, a “@computer MNA”, and a “@errands MNA”. Every day when you are looking reviewing your MNA notes, decide what needs to get done today.

Once you decide, you can simply copy the action item you want to accomplish from the MNA and paste it into a new note called Today and add a checkbox. The great thing about this method is that your Today note becomes reusable -- you guessed it -- every day!

Simply organize your Today note by each of your contexts in your system. Paste each of the action items you want to accomplish from each of your context MNA's into your Today note. At its core, it certainly does seem simple enough and you'll wonder why you've never implemented this method sooner. Again, this is an alternative to the approach I've listed here where I like to designate each of my Next Actions as a new note and tag by context and by the !!Today tag.

What about notebooks?

Notebooks and notebook stacks are hugely helpful. There is a lot of talk about using just one notebook (outside of the Inbox) in Evernote. The challenge with notebooks – especially with the incredible addition of nested notebooks or notebook stacks is deciding how many you truly need to be more productive and get things done.

The case for having multiple Evernote notebooks

There are three reasons why I believe there are benefits to having multiple notebooks: 1) having offline access (which requires being a Premium User); 2) sharing with others; and 3) organizing your reference material.

Offline Access

While I derive zero benefit from Evernote for making this recommendation, I strongly advocate becoming a premium member of Evernote – if for no other reason than you will have access to offline notebooks on your iOS device or Android device.

If you travel like I do, or at least have site visits with clients and/or colleagues, having separate offline notebooks might be critical to you if you do not have a WiFi or a 3G connection that will allow access to all of your notes. Let me give you a very specific use case of why this works so well.

Like so many of you, I travel everywhere with my iPad. In this one case, I had to be in three different cities on three different days very recently. That required me to make three different master itineraries – which leveraged the amazing note linking feature – and then at least 10 different agendas for my meetings (which also leveraged the amazing note linking feature to other notes in my Evernote notebook).

I love having access to these Master Travel Itineraries and Master Meeting Agendas that link to other notes and will allow me to be more successful at my meetings. Because I spend less time searching and more time doing, I look both practical and polished when I meet with a client! Without a WiFi or 3G connection, I would be unable to access my notes onsite because I just didn't have it at that office.

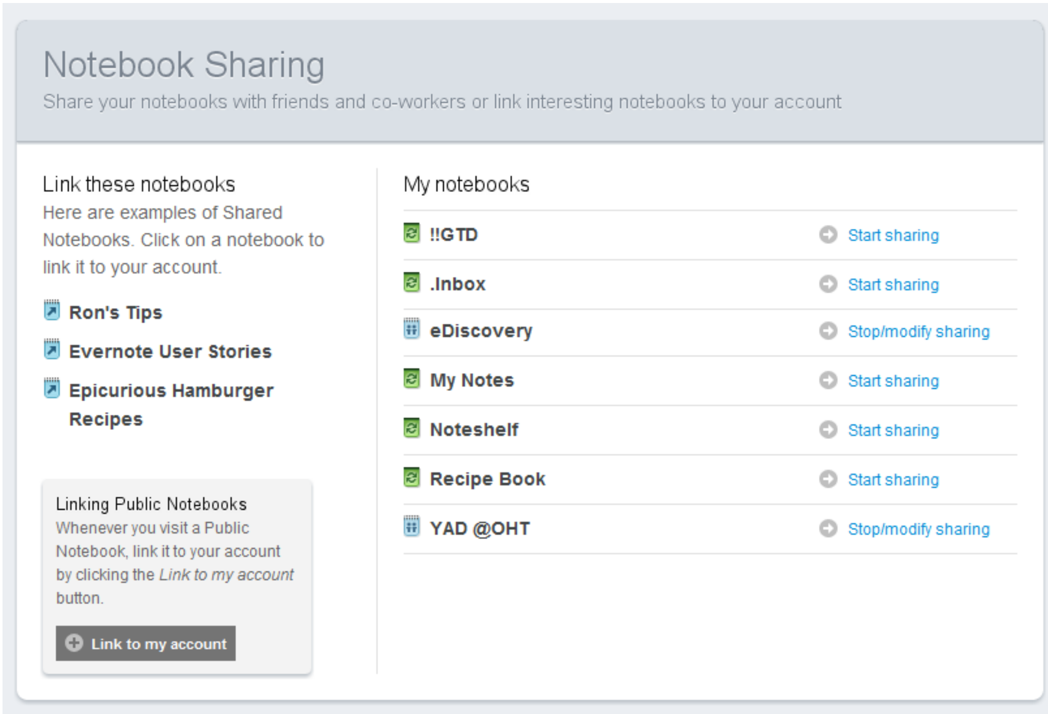
When I was at the airport, I wanted immediate access to all the information about my flight and rental cars and car services without having to search for the WiFi signal. Having that offline access to me is critical to have immediate access to all of my notes! Having separate notebooks for your travel days is very helpful in this case because otherwise, you'd have to make your entire Archive notebook offline – which in my case is about 4GB of data!

Sharing with Others

If you only have one notebook, you're unlikely going to want to share that entire Archive notebook with the masses! Therefore, having separate notebooks designed to be shared with clients and colleagues is critical! This is a beautiful way of having others see how a project is going, your notes on relevant news tied to a specific area (such as electronic discovery as I have set up), etc.

Here's a very good example of how shared notebooks are ideal for sharing. I am currently collaborating with someone at my local community center to startup a Young Adults Division club (I'm glad the age bracket goes up to 40!). My job is to basically start the program. I created a separate notebook just for this project and shared it with the person I'm working with in my community. I found pertinent information on other similar groups across the web, clipped them, and saved it in my notebook. I also used the Evernote hot key for taking a screen capture of any screen (on Windows it is Win+A) and added shots of a website so we can get ideas on developing our own. We also had a meeting where we brainstormed several ideas ranging from the name of the club, program ideas, marketing, target audiences, and of course next actions. All of this went into the shared notebook. Now, he can access all of my notes and next action items at any time to see what I'm doing. If he were a Premium user, he'd be able to add/modify notes as well if I set up those permissions for him. It truly is the ultimate productivity tool!

Another good example of the benefits of creating a separate notebook specifically for the purpose of sharing the content with someone else is tax season. I had a reader bring this specific use case to me. He plans on sharing his Evernote notebook called Taxes with his accountant. Within that notebook, there can be a parent tag called "tax deductions". Then, you can label, let's say all of the orthodontist invoices with an "orthodontist" tag. This way, any other invoices or receipts you have that are deductions, can all go under a separate tag, like "charitable".



Organization of Your Reference Material

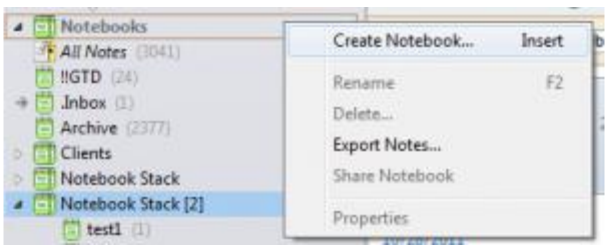
Using notebook stacks as opposed to parent/child tags for some of your reference material is another really good reason to have multiple notebooks.

Depending upon how many tags you have (fewer is better) and how savvy you are when it comes to searching tags, it might take you awhile to find those critical notes on a client and/or a project. A possible alternative would be to create stacked notebooks for Clients and Projects. The reason why this might be ideal is that you have immediate top level access to your clients. In addition, if you go into your toolbar, select View → and uncheck "Show Unassigned Tags", you will actually see only those tags relevant to that specific notebook!

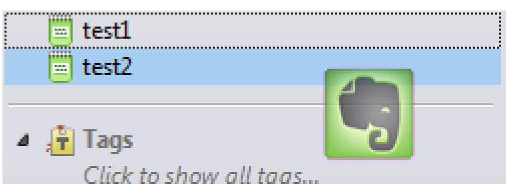
In my case, I did not put each of the 150 clients I'm working with in my stacked notebook, but rather just the top 10 I am actively working with at this time. I can simply click on the clients' notebook, and run a tag search from there – or go right to the note I am looking for if it is nearby. The same philosophy can be applied to projects – and if you do go this route – I can see how it would provide minimum interruption in your workflow!

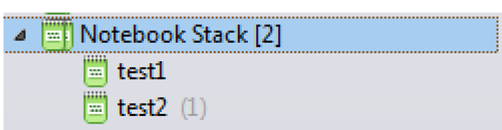
A quick tutorial on setting up multiple notebooks

First: create two new notebooks

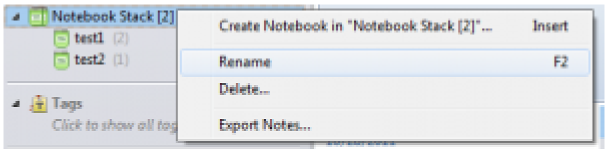


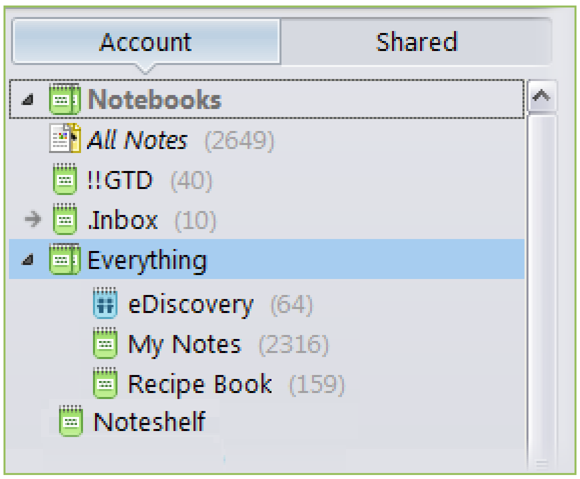
Second: left click on one notebook and then drop one on top of the other. Now you have a notebook stack!





Third: Right click on the stack and select rename – and now you can call it Clients, Projects, or whatever you like! That's it!





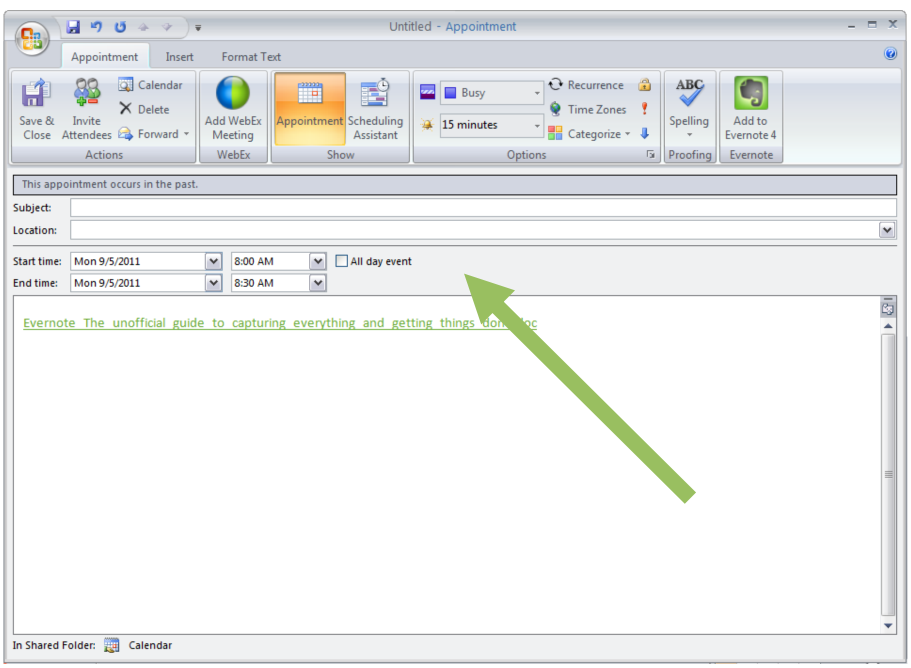
A special note about when to use your calendar

David Allen makes a concerted effort to make the point that if there is a task or an activity with a certain date, then it should go in your calendar, or your "hard landscape" as he says in the book. This really is extremely important. By keeping the calendar focused to actual appointments and actual tasks with due dates (i.e., a report that must be done by September 3), then it belongs in your calendar. Every other task that you have should go in your master list of tasks. The whole idea, as noted in the book, is that you should take a look at all of your Next Actions and determine what you can do given where you are (the context), your time, the amount of energy you have, and the priority of the task.

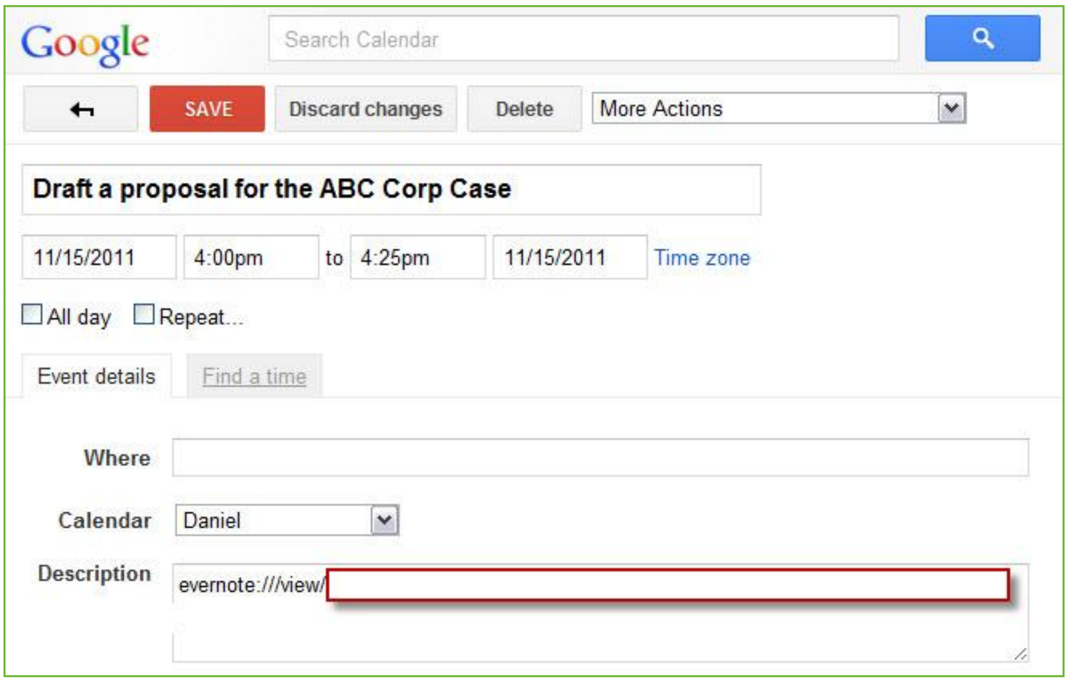
I am going to highlight three very specific ways that you can integrate Evernote and your Calendar today: 1) the first way employs Evernote Note Links; 2) a new application called [zendone](); and 3) how to use an interface-free service called [FollowUpThen.com]().

Evernote Note Linking and Your Calendar

Let's say I know one of my tasks will take two hours to complete, I'll right click on a note, select "Copy Note Link" and paste it into my calendar so that I can go right back to Evernote to see what it is I need to do and what is involved. By doing so, you now have a quick and immediate way of going directly back to Evernote to understand more about the task you need to accomplish or even link a note that contains information about a particular project.

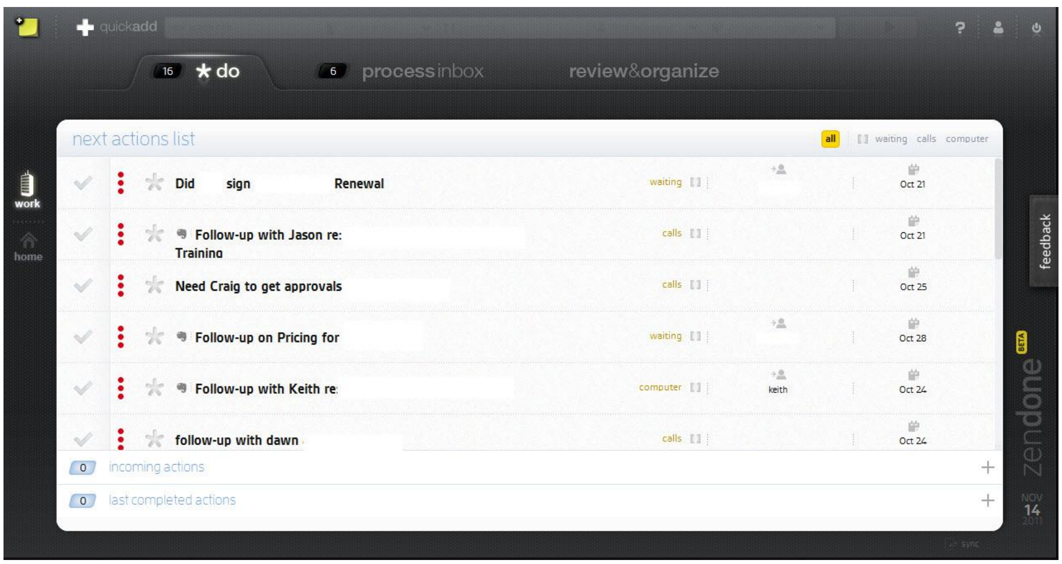


Unfortunately, this process doesn't work as smoothly (yet) in Google Calendar. If you take a look at the screenshot below (the link was redacted), you will see that I pasted a link, however, it does paste the link but it is not "linkable". To get around this on a PC, you would simply need to copy and paste that link into your browser address bar and it will open the Evernote application and go right to your note.



Getting to "Zendone"

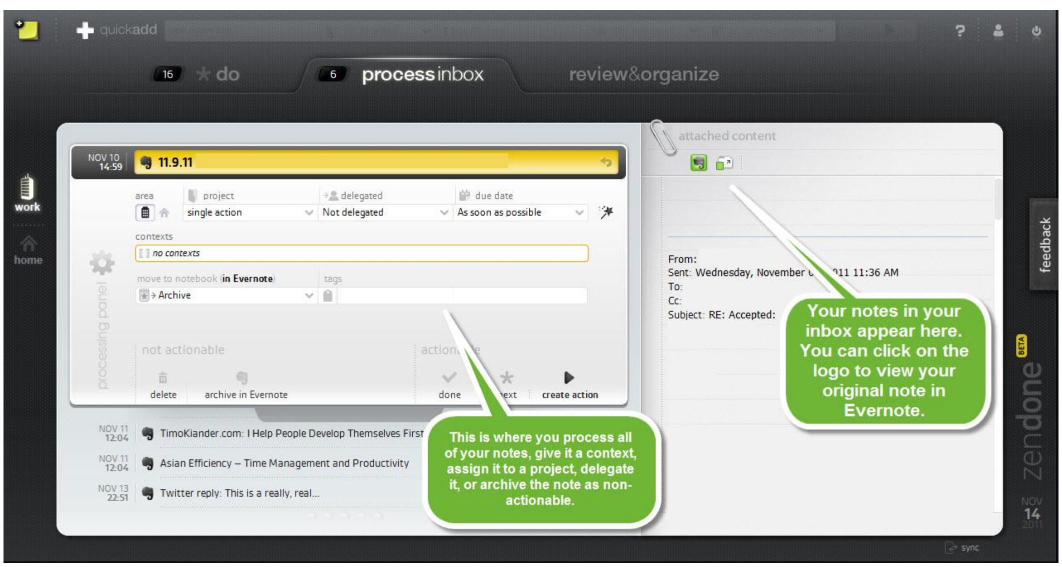
It might seem ironic that I'm talking about an app in a book where I say we need to rid ourselves of all other apps and just use one. I do not see any disharmony here as I think that *zendone* is different from any other application out there. The reason I think it is different is because it works with both Evernote and your Calendar in a way that is harmonious with my approach. Two things to note here: first, I do not receive any compensation from *zendone* at all for my description; and second, I am not in the business of using this book to review developers' applications. However, where I deem it appropriate and in line with my philosophy of stripping away every other todo application, I will make mention of it here. *zendone* describes itself as a "beautiful GTD application that integrates with Evernote and Google Calendar so you can use the right tool for the job." *zendone* currently integrates with both Evernote to make it your GTD Inbox and Archive for reference material as well as your Google Calendar to make it your GTD Calendar.



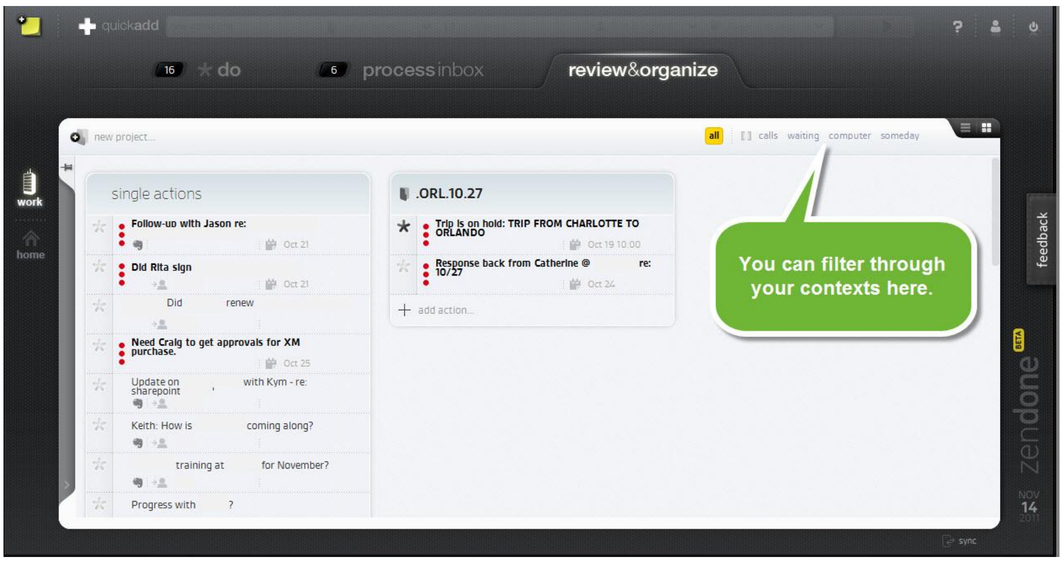
While the application is currently in private beta and offers a web application, I do know from the development team that there are future plans include to release both an iPhone and Android app. When it gets released from beta mode, they will offer both a free version with some limitations and a premium version with more capabilities.

zendone's developers agree with my belief that we need to be as simple as possible. *zendone*'s approach is about using the right tool for the job. What they have done is allowed us to use Evernote to collect our "stuff", and use *zendone* to process those notes in the designated notebook, organize those notes into actionable versus non-actionable notes, review those next action items and then do them.

In essence, *zendone* serves as a layer on top of Evernote for the GTD aspect only. It should be noted that while you can access your notes in their application, it is not bi-directional. In other words, the changes that you make to your notes do not show up in Evernote as well. If there is anything incongruous with my philosophy it is this one point. For example, if I process a note in *zendone* that is in my Evernote inbox and decide that it has to do with "Project ABC" and belongs in my "waiting" list, delegated to Sam, those changes do not also appear in Evernote. The developers point of course is that you should continue to use Evernote for the collection of everything you do, including your single next action items and project related material and then just process it all in *zendone*. Note that *zendone* creates tags in the notes you have processed and organized and you can filter those tags accordingly in Evernote.



But the single most important improvement *zendone* offers over Evernote alone is this: its user interface reflects the GTD concepts we are managing in our head. For example, if I want to archive an item when I am processing my inbox as reference material, I want to have an "Archive" button to express that. And I want to watch my GTD inbox rendered in the screen, which is different from the way I see projects with actions. *zendone* makes a big effort to achieve this. Its user interface expresses the GTD concepts you know, directly, so it's easier for you to implement your workflow.



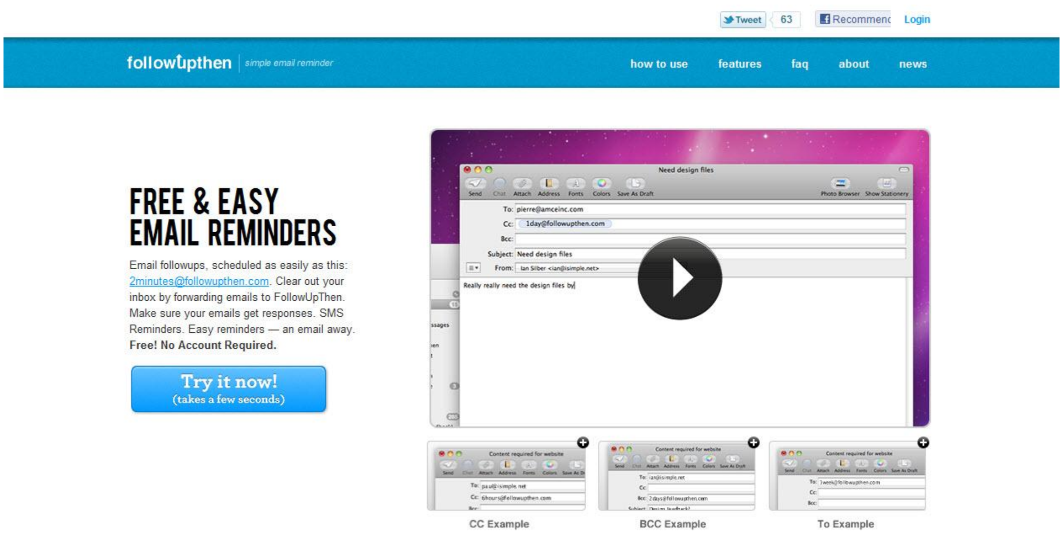
When you are using Evernote alone, you are not using an application that manages GTD concepts (inbox, actions, projects, calendar). You are using an application designed for managing notes, tags and notebooks. This impedance has to be solved using conventions. We have found that not having to use conventions lets you be more relaxed and focused when implementing your GTD workflow.

zendone looks to improve upon that missing link between your calendar and Evernote. In *zendone*, Google Calendar is your GTD Calendar. Similar to processing tasks, *zendone* is not replacing anything but rather it is the conduit for your calendar. You can create an action, with a due date in

Google Calendar and a note in Evernote, and *zendone* serves to "glue" everything together. That's what *zendone* offers: an application for implementing your GTD workflow using Evernote and Google Calendar for what they do best.

Reminding Yourself with FollowUpThen.com

The alternative approach is using an amazing service called FollowUpThen.com. If you follow my blog, you will have noticed that I created a screencast that talks about the service. It touts itself as being free and easy email reminders. It is the easiest way to remind yourself of something that needs to get done in the day and/or time increment of when you want to be reminded. You simply put the day and/or time increment in the "To", "cc", or "bcc" of the email.



There are various ways you can send yourself an email reminder. You can schedule reminders using minutes, days, months, years, recurring reminders, etc. For example, 1minute@followupthen.com,

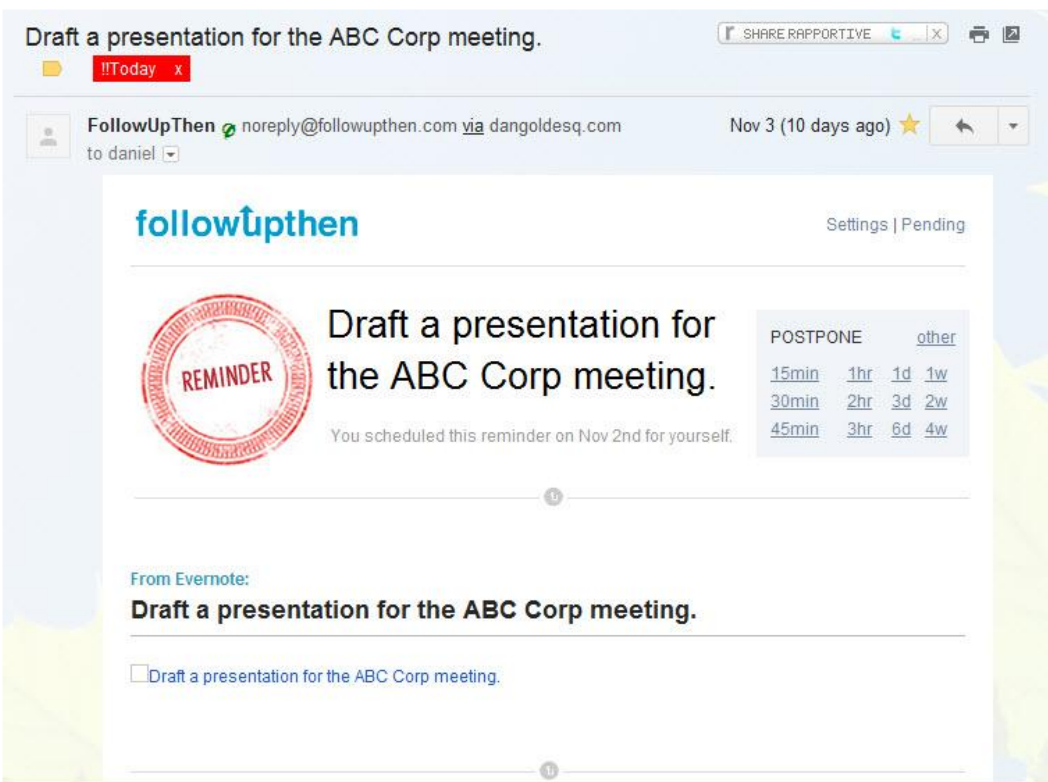
1day@followupthen.com, 1year@followupthen.com, or even 2pmNov15@followupthen.com.
It's a completely free service, but there is a premium feature that allows many different useful features such as an online dashboard that shows all of your tasks and allows you toedit, or cancel them.

In this first example, you can leverage the power of linking your tasks with your project related reference material in Evernote. Let's say you have a note that is tied to a specific project, let's call it the "Project ABC Corp". Tag it with ".ProjectABC". We also have a task that is related to this specific note. What we'll do is create a new note, input a checkbox, and then write out our task, such as "Draft a presentation for the ABC Corp meeting." Then, tag it with the appropriate context such as "@computer" and with the project tag, ".ProjectABC". Finally, if you know it is a next action item that you must get to soon, then you may want to tag it with a "!Next" tag.

How would you connect the task you've just made with the project related reference note? You're going to use my favorite Evernote feature that I have evangelized several times throughout this book: copy note linking. Simply right click on the project related note, select copy note link. Go back to your task, highlight the entire task, right-click and select insert hyperlink, paste the link, and click okay. Now, when you click on the task, it'll bring you right to the note, which is exactly what you need in order to get this task accomplished!

Now, let's take it a step further. I know that this is due on November 15. What is the best way to do that? During your weekly review, you would certainly see that this is due by November 15. But what if you wanted to be reminded that you need to get this done prior to the 15th, or you want to begin working on it 2 weeks prior to the 15th. Here's how to integrate the two. First, click on the Share button in the toolbar within Evernote. Make sure you select the "Send by Email" option. In the "To" field, type 2days@followupthen.com. It's that easy. Now, in 2 days, you'll be reminded that you need to start drafting this presentation for the ABC Corp case!

In your e-mail inbox, you'll receive an email confirmation (which you can disable), that says "Success. We've got you covered." It confirms that you will be reminded that this task needs to be done in two days. In two days, you'll receive the reminder from FollowUpThen.com.



What I like to do is create a filter in Gmail or a rule in Outlook that instantly creates a label so that I can quickly see emails from FollowUpThen. This will also be helpful in allowing you to see all of the tasks that are marked for you to do Today. Then, when you go back to Evernote, you can remove the !Next tag and replace it with a !Today tag. This is a very easy way to leverage both the Evernote Copy Linking and this free and easy service to help you remember things called FollowUpThen.com.

Projects

David Allen defines a project in his book Getting Things Done as any task that will require more than one action item to complete.

When I first read the book, I did not fully comprehend the idea that if you had a task that requires more than one action to complete, you had a project. The reality is, most people just do not think that way. Who really creates separate tasks for a task like "buy a new lawnmower"? Probably not many people. However, the reason you want to take a look at any task on your list and determine if it will take more than one step to complete is because it allows you to think about everything that must be done in order for you to successfully complete the task.

Let's talk about a task that is a bit more challenging: buying my wife a birthday present. This isn't nearly as simple as it might sound. There are really multiple tasks involved in buying her a present. It *really* is a project! (I think most husbands might say the same even without realizing that's how GTD defines buying a present!) Since we know there are multiple tasks involved, we need to list every single action item.

Here's how I would do it in Evernote. Just like any other project, I would create a new note in either my general Archive notebook or in the specific Client notebook and make it my **Master Project Note or "MPN"**, and tag it appropriately. *(Because you've purchased this eBook, you now have access to downloading a copy of this Master Today Note, simply by clicking on this link. If you double click on the file, it will open in Evernote for you to use! Check the Appendix below for more!)* Your MPN is where you brainstorm about everything that needs to happen in order for you to have a successful outcome with your project. More on this below.

In this case, I would tag it with .wife_birthday (the prefix "." is used so that it bubbles up to the top of the list). Next, I leverage David Allen's "Five Phases of Project Planning." To review, those 5 stages are:

1. Defining purpose
2. Outcome visioning
3. Brainstorming
4. Organizing
5. Identifying Next Actions

Let's apply those 5 stages to this project. In my master project note, I would define my **purpose**. That's easy – make my wife happy by buying her a great birthday present. I write down all my ideas about what I'd want to get her. My intention to buy her a great present and my purpose is to make her happy.

My **outcome visioning** is what I believe the present would look like, the way my wife would react when I give it to her, and how we would both feel when she opens the present.

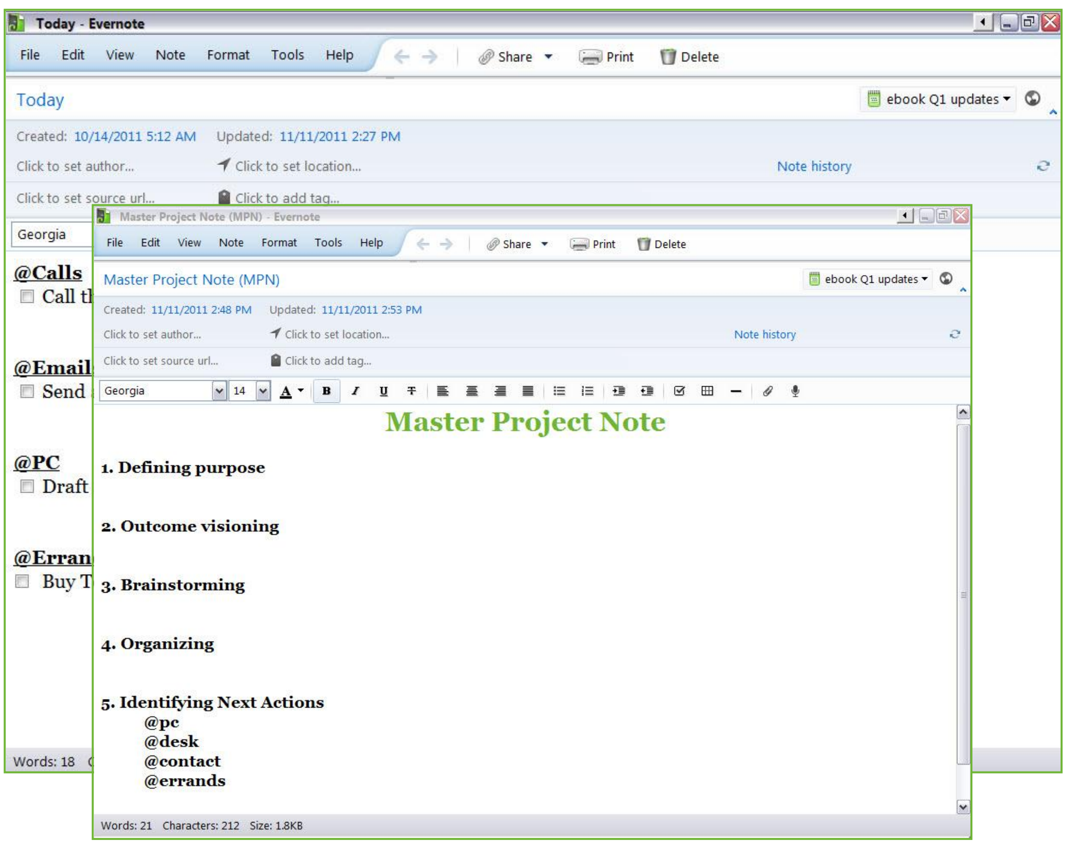
Next, I need to **brainstorm** all the different possibilities of what I'm going to buy her. In my note, I begin to freeform several ideas. For example, I know that clothing is a really bad idea. Should we take a vacation? If I did, what would I do with the kids? Do we have a babysitter? Would her mother be in town that weekend? Are there other things on the calendar on the weekend I chose? Maybe, I think that a diamond necklace is a superb idea. This will definitely not be easy as it sounds! It will add a whole other layer of complexity. Should I go to a private jeweler? Should it have diamonds? Should it be white gold or yellow gold? Dare I go to the mall and look? Should I commission a jeweler who will help me design and craft a unique diamond necklace exclusively for my wife? Do I have the budget? Should I put it on the American Express or the Master Card?

As you can see, there are clearly a lot of action items associated with this particular project. I now have to **organize** my ideas. What do I need to do first if I want to buy my wife a white gold diamond necklace? I begin to organize all of my thoughts now in my MPN: First, I need to research ideas online to decide what this necklace would look like. Next, I need to draw out an example of exactly what I want to show a jeweler. Then, I'll need to research various local jewelers to see if they will make a necklace for me. The list goes on within my master project note in Evernote. As noted in *Getting Things Done*, I need to identify all components, sequences, and priorities.

Once I have organized everything that must get done, the fun part begins. I now need to define my **next actions**. Let's go through them together as I had done in my note:

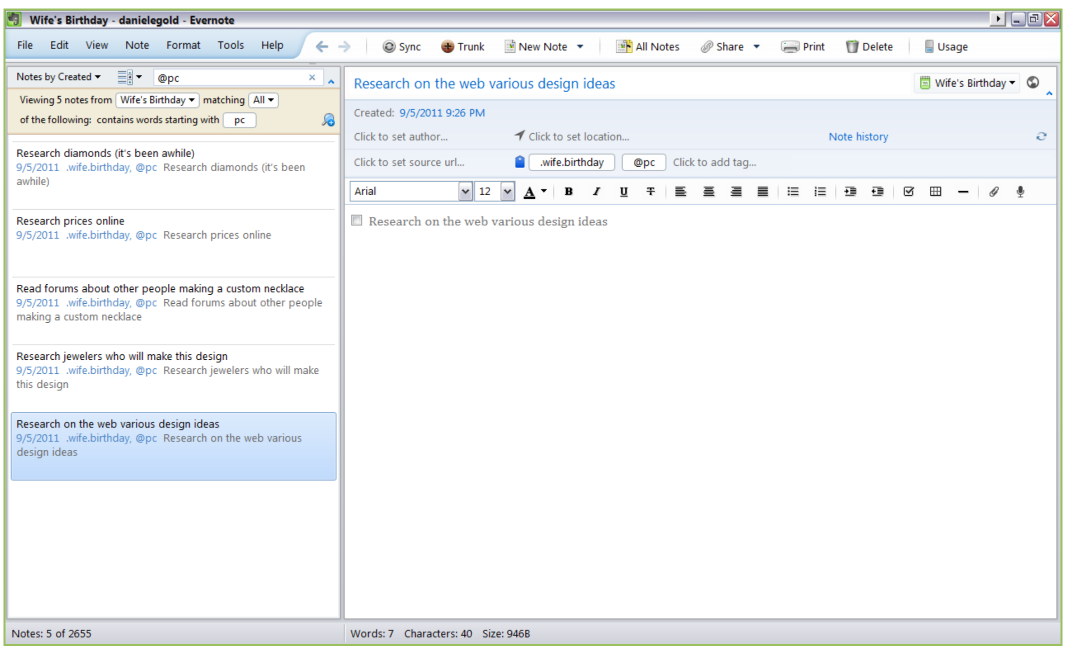
- @pc
  - Research various design ideas on the web
  - Research jewelers who will make this design
  - Read forums about other people making a custom necklace
  - Research prices online
  - Research diamonds (it's been awhile)
- @desk
  - Draw out sketches of what I want the necklace to look like
- @contact
  - Call "Joe" at "XYZ Jewelers"
  - Call "Pete" (friend) to get his ideas
  - Call insurance agent to insure the necklace
- @errands
  - Meet with "Joe" the Jeweler
  - Meet with "Fred" the Jeweler
  - Go to other jewelry stores to look at other ideas

After you've sorted out all of your next actions by context, you can handle it in one of two ways. The first would be to copy all of the next actions by a particular context and paste them into a new note and tag it by that context and the project. This allows you to be able to focus in on all of the tasks that you need to do for that particular project and by that context. The advantage for many people is that they get to focus more in one note on all of the things that must get done by that context while working on their project. In essence this becomes a **Master Next Action** for your project. *(If you double click on the file, it will open in Evernote for you to use!)*



For others, they like to have all of their next action items broken down in single notes, as described above. To accomplish this, you would simply copy each next action and paste it into a new note, preceded of course with a checkbox and then assign it with both the context and the project tags.

The good news is that there is no right or wrong approach - both methods allow you to get all of your next action items out of you MPN and into a new note where you begin to check off and get things done. Either way makes all of my Next Actions extremely easy to understand and I'll always know what to do and where to do it based on where I am, time, energy and priority. As far as putting this in a notebook – it really doesn't matter. Unless of course, you want to share your design ideas with the jeweler and then of course, you will want to setup a shared notebook! When it comes time to **doing** these tasks, searching is a breeze, as you'll see below.

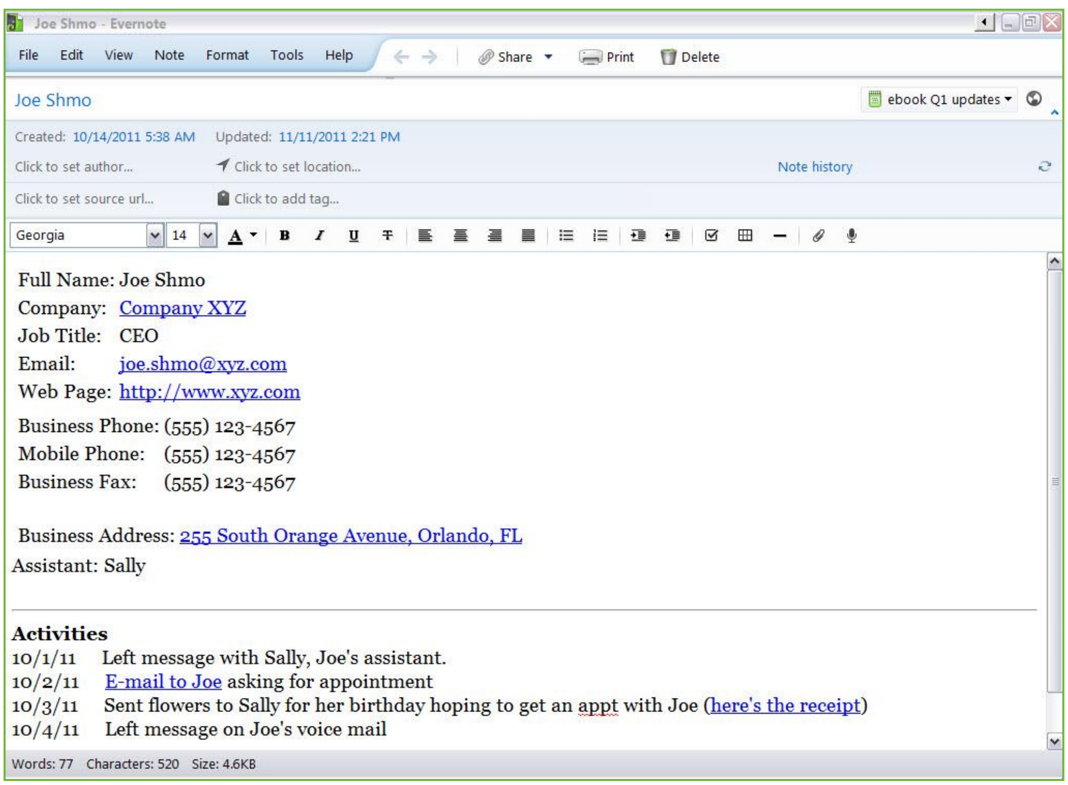


Organizing Clients with a Master Client Note

Here's an incredible way to leverage copy note linking to help you not only become more organized, but also allow you to leverage Evernote as a pseudo-CRM (client relationship manager) tool. The problem I've typically had is that I'll meet someone, scan their card in with my ScanSnap S1100, forward e-mails that need to be referenced at a later date into Evernote, write notes about calls I've had with the client or information I've gleaned from my colleagues, etc. Basically – there

are a whole lot of notes about one particular person and no real way to cen tralize this information. I'm about to completely raise the bar in organizati on for you.

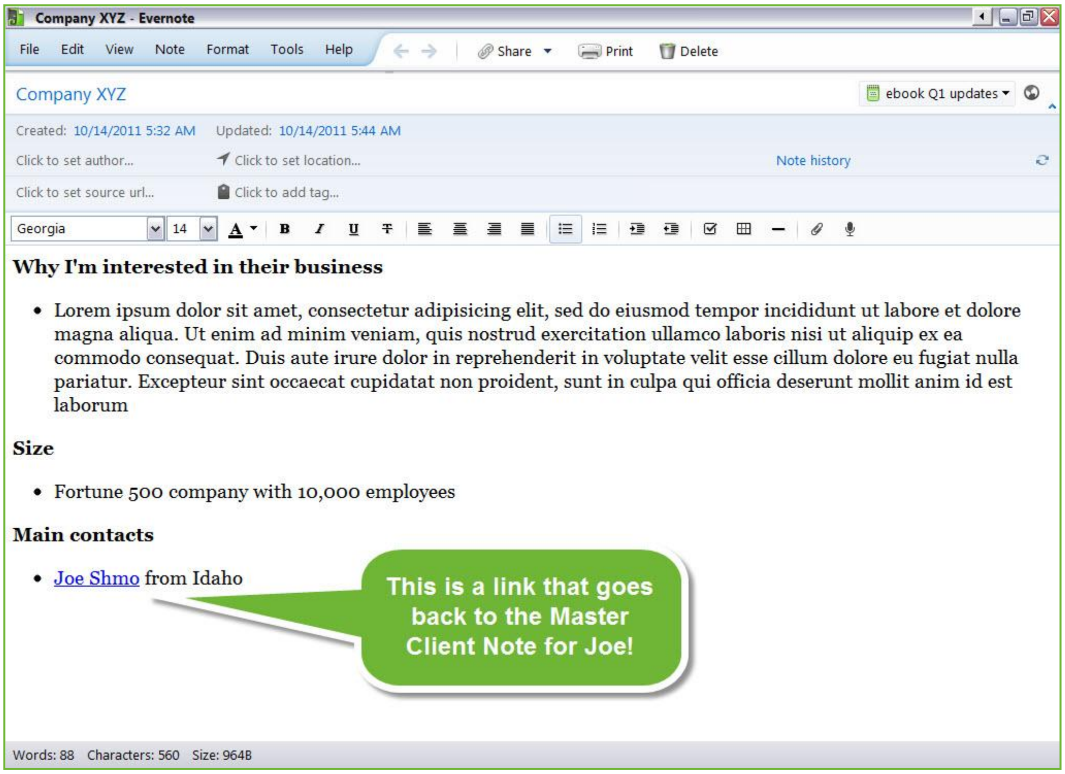
We're going to create what I call the **Master Client Note** (MCN).



(Clicking on this link will allow you to download this note for your use!) The MCN will allow us to leverage copy note linking to centralize all of the critical information about a client in one note. That's right - one note. Leveraging the note linking allows you to paste other notes' hyperlinks into the MCN, which allows you to quickly reference earlier notes, and then use the history arrow in the toolbar to go back to the MCN. The result is one legible note that gives the high level understanding of your relationship with that client.

Let's walk through exactly how this would play out. In my notes, I've got the following information on a client: her business card, notes from internal team calls on this particular person, notes about calls I've had with her, all of her contracts, and information I found on her from LinkedIn, Facebook and Twitter (yes, I always check there!). Now, to create my MCN, I always paste the contact's business card at the top of the note. If you don't have it, don't fret. Copy and paste their information from their signature line in their email, their v-card, or just type it. Then, I insert a horizontal line. I begin putting information in the note by date.

Since there's no real way to sort the dates obviously, I just begin with the oldest entry. Each entry is like a blurb or the main idea from that particular note. For example, if I'm talking with the client and the main idea is that they're not going to renew their contract, in the MCN, I simply write "Client says they're not going to renew." I highlight this text, right click and paste the link from the original note. I continue along this path until I get to the most recent.



The benefit to the MCN is that you have a wonderful way of staying current, organized, and creating a master high level list of everything you've done with the client. Do I recommend doing this with every single client you have? Not at all. I do it for my most important clients, and the ones that I typically speak with on a fairly frequent basis.

As a footnote, and I'm sure you already figured this one out while reading this, you can also create a Master Company Note with the same kind of information. In fact, I once got very creative and linked my Master Client Note to my Master Company Note, providing me an opportunity to drill down from a company to the client.

Review

The best way to keep your Evernote system up–to–date and have greater clarity in your life is by doing both daily and weekly reviews. My advice would be to keep it simple, predictable, reliable, and easy enough for you to always know what you need to do wherever you might be and how much time and energy it will take to do certain tasks.

I do two sets of reviews – daily and weekly. My daily reviews are in the morning and in the evening. In the morning, I go into Evernote and review everything I have in my Context tags and decide what is actionable Today and what is Next. I like to give myself at least 3 major tasks to do during the day. I also review my calendar and look at all my appointments for the day. As I noted above, if I have tasks that will take me a couple of hours, I will block out my calendar accordingly so that no one ends up booking something for me in that time slot.

In the evening, when I am wrapping up for the night, I review what I was able to accomplish during the day, what is leftover, and begin tagging specific tasks for the following day. I also review my calendar for the following day and decide if there is anything I need to modify or add. It is equally a good idea to look at all of the tasks you've tagged with !Next. Try to figure out which of those tasks you want to accomplish the following day, remove the !Next tag and place a !!Today tag on that task. Each of those tasks will obviously have a context tag as well.

I'll also take a look at everything in my Waiting For tag to see if anything I had delegated had been completed that day. Lastly, I'll take a look at my Someday list to see if there is anything I want to take off that list and put on either my !!Today or !Next list.

The best and most efficient way to conduct your weekly review in Evernote is by implementing a saved search. Conduct a search in your GTD notebook for todo:false. This will bring back all of your unfinished next action items. In addition, you'll be able to see if you accidently placed some of your action items in your GTD notebook without assigning them the appropriate context. In addition, you'll have a much clearer idea as to whether you need to incubate some of the tasks or assign some of them with your Today tag.

David Allen stresses the Weekly Review and I completely understand why. I was a bit late to the game on this one, and it is definitely to my productive detriment that I did not implement a weekly review. It is very important to scan through your calendar and all of the tasks completed for that week, find any open loops, review all of your projects, identify new tasks that must be done, and begin planning for the upcoming week. This relieves a lot of that psychic RAM and gives a very good sense of accomplishment.

Do

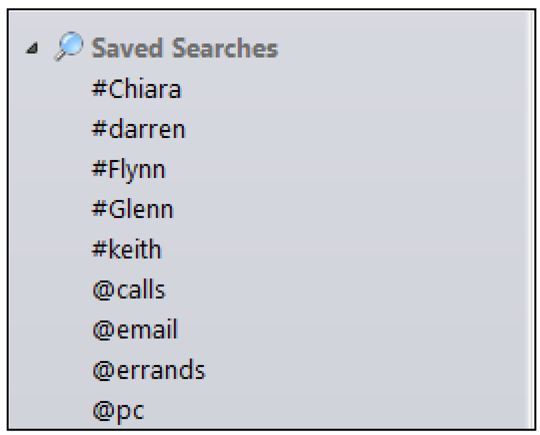
All of this would be for naught if it there weren't an end to the means here. The whole point, naturally, is to actually *do* something with all of your tasks.

I've structured the way I handle tasks in Evernote in a very specific fashion – picking up hints from both Ruud Hein and David Ward by implementing Evernote Saved Searches and using things like "!!" and "!" to ensure the important tags rise to the top.

Saved Searches

I've employed a specific number of saved searches to help me "do" my tasks no matter where I am. For example, you can easily search for @calls tasks by searching: todo:false tag:@calls. This quite simply allows you to search all of the unfinished checkmark notes that are tagged with @calls.

I sometimes have many more tasks sitting in my waiting list than I do tasks assigned to myself. For all of those tasks that I are delegated and tagged waiting, I create name specific searches that look like this: todo:false tag:waiting Darren. This gives me all of the unfinished tasks that I'm waiting for Darren to do.



As I go through all of my tasks in my filtered set of tasks called !!Today, I simply check the checkbox indicating that I have completed my task and click the “x” to delete that tag in my task. In some instances, I will just delete the note. If I choose to get rid of the Today tag, you’ll see that it just goes away because it no longer has the tag !!Today.

What do you do with all of the tasks that you have completed? You can do one of two things. First, if you do not need to reference your completed task any longer, just delete the note! However, if you want to reference it later (maybe you are doing an audit of the project), you can check it off and then archive the task.

This is incredibly ideal, especially on an Android phone because I have shortcut widgets on my home screen for each of these contexts. All I do is click on it and I know exactly what I need to accomplish.

This way, if you're out and about, you can look at your @errands list and know you need to buy milk. If you've got free time, check your @contact list to see who you can call. It's all dependent upon the time and energy you have to get things done in the moment.

If you like this setup, here's how to do it: go into Evernote and run a saved search. For example, run a search for "tag:@calls todo:false". This will give you a list of all of your next action items that you have on your @calls context list. If you tap the menu key, you'll see there's a "Create Shortcut" option. Tap that, and you'll see the shortcut on your desktop of your phone!

Scanning each of these two different saved search groups allows me to constantly scan during my review to best help me decide what I need to do based upon the context (where I am), time available, energy available, or the priority of the task.

Outside of Evernote, always reviewing commitments on my calendar allows me to best understand which tasks I need to do and when since I'll typically know how much time and energy I have for each task.

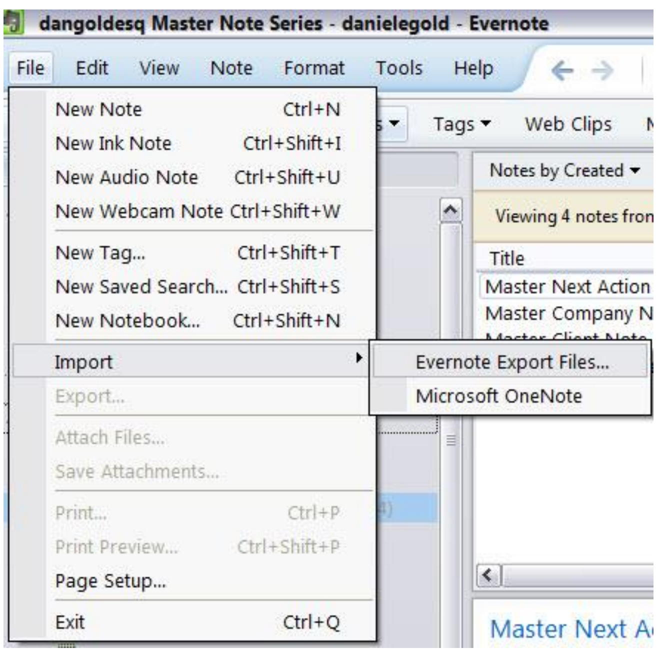
By sticking to a strict review regimen, you will find that your mind and body become more relaxed and stress free. You're dumping all of your psychic RAM and getting everything in its proper place to become more productive and focus on getting things done!

Conclusion

My goal in writing this eBook was to talk about the tremendous benefits of creating a more productive life using Evernote. I have always thought that Evernote is more than a note taking application; more than a word processor; more than an archiving repository; and more than a to–do list. Evernote is a life management tool. By applying the tips I have set forth above, it is my hope that there is at least one thing you that you can apply in your own life. Something that will help you reduce your own psychic RAM. Something that will help you achieve more balance and a "mind like water" at home, at work, and for all of your various responsibilities in life. Here's to becoming more productive! Cheers!

Appendix

As a benefit to purchasing my eBook, I have provided downloadable templates to help aid you in your setup. I hope this helps add to your productivity! When you click on the link, it will download the Evernote note I created for you. You can either double click on the file (you will need to associate the file with Evernote if it does not open automatically for you) or in Evernote, simply go to, File, select Import, and then Evernote Export File. See screen capture below.



[The Master Note Series Notebook](#): Clicking here will allow you to view the notes below and by right-clicking on each note, you can copy it into your own notebook. The advantage of doing this is that as I add to this notebook, you will directly benefit from receiving any update I add!

Master Next Action Note

Master Project Note

Master Client Note

Master Company Note