GENERAL

evernote gtd how to use evernote for getting things done

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Getting Started: How to Use Evernote for Getting Things Done

Evernote has long been celebrated as a versatile note taking tool, but its true power lies in how well it can be adapted to a proven productivity methodology: Getting Things Done, or GTD. By pairing Evernote's flexible organization, robust search, and cross device sync with the GTD framework, you can turn scattered thoughts into a streamlined, action oriented system that keeps you focused and productive.

This guide walks you through every step—from setting up your Evernote workspace to mastering reminders, tags, and project pages—so you can harness the full potential of Evernote for GTD. Whether you're a student juggling assignments, a freelancer managing multiple clients, or a busy executive looking to reduce overwhelm, the strategies below will help you keep your tasks, ideas, and projects in clear, actionable order.

Understanding the GTD Methodology

What is GTD?

Getting Things Done is a time management system developed by productivity consultant David Allen. GTD's core premise is that your brain is a **collection device**—it excels at generating ideas but struggles to remember them. By externalizing tasks into a trusted system, you free mental bandwidth for creative and high level thinking.

Core Principles of GTD

1. Capture everything that requires attention.
2. Clarify what each item means and what to do next.
3. Organize tasks into context, priority, and project categories.
4. Reflect regularly through reviews.
5. Engage by acting on the most appropriate tasks at any moment.

Why Evernote is a Natural Fit for GTD

Evernote Features That Align with GTD

- Cross platform sync ensures your system is always accessible.
- Intuitive notebook and tag hierarchy supports context and project grouping.
- Robust search and filters let you find next actions instantly.
- Built in reminders and due dates keep deadlines visible.
- Web Clipper and mobile capture streamline idea intake.

Benefits of Using Evernote for GTD

- Centralized hub for all personal and professional information.
- Customizable templates reduce setup time.
- Offline access prevents data loss during connectivity issues.
- Integration with calendars and third party tools expands functionality.

Setting Up Evernote for GTD

Before you can capture anything, you need a clean, logical structure. Think of Evernote as your “brain’s filing cabinet.”

Create a Master Notebook

Start with a single **Master Notebook** titled “GTD.” This will hold all other notebooks and act as a reference point.

Build Core Notebooks

Inside the Master Notebook, create the following foundational notebooks:

- Inbox – where you drop all raw information.
- Projects – each project gets its own sub notebook.
- Next Actions – a quick access list of actionable items.
- Waiting On – tasks delegated to others.
- Someday/Maybe – ideas that may become projects later.
- Reference – static information like templates, research, and contacts.

Use Stacks for Project Grouping

If you manage multiple related projects, group them into **Stacks**(e.g., “Marketing Campaigns” or “Product Development”). Stacks keep your workspace tidy while preserving logical relationships.

Capturing Ideas and Tasks

The first GTD step is to capture everything that needs your attention. Evernote offers several capture channels.

Quick Capture

Use the **Evernote web clipper** or the **desktop app’s “New Note” button**to jot down thoughts instantly. Keep the note brief—just the action or idea, no elaboration.

Email to Evernote

Forward any email that contains tasks or important information to your Evernote **email address**. The email will automatically become a note in your Inbox notebook.

Mobile Capture

Install the Evernote mobile app and use the **camera button**to snap photos of whiteboards, receipts, or handwritten notes. These images will be stored as separate notes, ready for processing.

Organizing with Tags and Stacks

Once captured, you need to sort notes into meaningful categories.

Tagging Strategy

- Context tags (e.g., @Phone, @Computer, @Errands).
- Priority tags (e.g., #Urgent, #High, #Low).
- Project tags (e.g., #WebsiteRedesign).
- Time tags (e.g., #Today, #ThisWeek).

Stacks for Projects

Within the Projects notebook, create a **stack**for each major project. Inside each stack, add individual notes for tasks, research, and deliverables. This nested structure mirrors the GTD “next actions” hierarchy.

Processing and Clarifying Notes

Processing is the heart of GTD. It turns raw notes into actionable items.

Daily Review

Spend 5–10 minutes each day reviewing your Inbox. For each note:

1. Decide if it's actionable or reference.
2. If actionable, move it to the Next Actions notebook or a project stack.
3. Assign a due date or reminder if necessary.
4. Tag with appropriate context and priority.

Weekly Review

Once a week, conduct a deeper review:

- Check the Waiting On notebook for follow ups.
- Move any completed tasks to an Archive notebook.
- Update project statuses.
- Add new ideas to the Someday/Maybe notebook.

Setting Up Reminders and Due Dates

Reminders ensure you never miss a deadline.

Using Evernote Reminders

When creating a note, click the **"Remind me"**icon and set a date/time. Evernote will push a notification to your phone or email.

Integration with Calendar

Sync Evernote with Google Calendar or Outlook. This way, your reminders appear alongside your other events, providing a unified view of your day.

Third Party Automation

Tools like **Zapier** or **IFTTT**can automatically create Evernote notes from tasks in Trello, Asana, or Todoist. This keeps all your systems in harmony.

Managing Projects in Evernote

Projects are the backbone of GTD. Each project should have a dedicated space.

Project Pages

Create a single note that serves as the **project hub**. Include:

- Project goal.
- Key milestones.
- Stakeholders.
- Links to sub notes and resources.

Using Checklists

Evernote allows you to add checkboxes. Use them to track sub tasks within a project note. Mark items as complete to visualize progress.

Linking Notes

Use the **link icon**to connect related notes (e.g., a research note linked to a project hub). This creates a web of information that's easy to navigate.

Tracking Next Actions

The **Next Actions** notebook is your "to do" list. Keep it lean and actionable.

Next Actions Notebook

Each note represents a single action. Include the following fields:

- Action verb (e.g., "Call," "Email," "Draft").
- Context tag.
- Due date or reminder.
- Related project tag.

Using Evernote's Search

Search by tags or keywords to find the next action you need to tackle. For example, searching **#Urgent @Phone** will surface all phone calls that are urgent.

Filtering by Tag

Create **filtered views**(via the "Filters" sidebar) to display only notes with specific tags. Save these views for quick access.

Maintaining a Clean System

Even the best system can become cluttered. Regular maintenance keeps it efficient.

Archiving

Move completed or outdated notes to an **Archive** notebook. This keeps your active workspace free of noise.

Deleting

Don't let redundant notes accumulate. Periodically review the Archive and delete anything that's no longer useful.

Backup

Export your Evernote data as an **ENEX file**monthly. Store it in a secure location (cloud or external drive) to safeguard against data loss.

Advanced Tips for GTD Mastery

Templates

Create a **"Project Template"** note that includes sections for goals, milestones, and tasks. Duplicate it for new projects to save time.

Keyboard Shortcuts

Learn shortcuts like **Ctrl+N** (new note), **Ctrl+T** (add tag), and **Ctrl+Shift+L** (list view) to speed up your workflow.

Evernote Web Clipper

Clip articles, PDFs, and screenshots directly into Evernote. Use the "Clip to Notebook

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