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So Little Time, So Much Paper®: Organization and Time Management Techniques for Lawyers

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SO LITTLE TIME, SO MUCH PAPER®:
Organization and Time Management Techniques for Lawyers

by
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Presented for the
Alaska Bar Association
Anchorage, Alaska
Wednesday, April 28, 2010

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MAIN HANDOUT

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Evaluation

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SPEAKER BIOGRAPHY

Margaret Spencer Dixon is a consultant specializing in time management, project management, and stress management seminars for lawyers and legal professionals. Meg came to the field of time management by way of a career in law, during which she practiced in the litigation and energy groups of the law firm formerly known as Shaw Pittman in Washington, D.C. She received her undergraduate degree, cum laude in economics, from Princeton University in 1982, and got her law degree from Stanford Law School in 1985. After law school she clerked for Judge Cecil F. Poole of the United States Court of Appeals for the Ninth Circuit in San Francisco.

In 1992, Meg left the practice of law to found Spencer Consulting, and since then has been giving speeches, writing articles, and conducting seminars on many aspects of time management and related subjects such as project management, stress management, overcoming procrastination, and how to run effective meetings. She has presented seminars for numerous law firms, CLE providers, government agencies, corporate law departments, and Harvard Law School. An extensive biography, client list, testimonials, seminar descriptions, and MCLE information are available at her website, www.TimeManagementForLawyers.com.

Meg's specialty is creating customized time management, project management, and stress management programs and presenting them in-house at law firms and corporate law departments for lawyers, administrative staff, and legal support staff such as paralegals and legal assistants. The primary goal of each seminar is to provide practical, specific techniques that participants can use immediately to work more efficiently, provide high-quality and timely service to their clients.

The pre-seminar customizing process (which is strongly recommended but not required) includes a Sponsor Questionnaire, Pre-Seminar Surveys, and telephone interviews with representative participants as well as with IT specialists familiar with the software available to attorneys and professionals at the firm. After an in-house seminar, Meg frequently performs one-on-one coaching for partners, associates, and professional staff who want to further strengthen their skills.

Meg's most recently-developed program is ***Project Management for Lawyers and Legal Professionals***. As clients and organizations become increasingly demanding, the use of project management techniques -- which have been used extensively and successfully for years in corporations, consulting firms, and accounting firms -- is becoming an invaluable tool for competitive law firms and professional organizations. This interactive, hands-on workshop covers the basic principles of project management and demonstrates how to apply them to organize, plan, and monitor a variety of projects (including litigation, transactions, and non-billable in-house initiatives). Using fact scenarios from actual projects they are working on, participants learn how to use project management techniques to enhance clarity and transparency in communications, increase predictability, lower costs, reduce time spans, and optimize results. Topics include:

- Defining the Project So All Stakeholders Are on the Same Page
- Creating a Functional and Effective Project Plan
- Identifying, Organizing, and Scheduling Tasks
- Estimating How Long Various Tasks Should Take
- Setting Realistic Deadlines and Keeping Projects on Track
- Closing Out Projects Including Creating Forms and Checklists for Use in Future Projects
- Analyzing Lessons Learned and Developing "Best Practices" to Continually Improve Firm/Organizational Processes

Project management is particularly useful for leaders (and future leaders) of multi-person project teams who strive to provide exceptional service to both internal and external clients.

Meg is based in the Washington, D.C. area, and can be reached at 301-949-2214, at MegSpencerDixon@TimeManagementForLawyers.com, and via Spencer Consulting's website at www.TimeManagementForLawyers.com.

SO LITTLE TIME, SO MUCH PAPER®:

Organization and Time Management Techniques for Lawyers

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INTRODUCTION

The goals of time management are:

- Efficiency -- producing output with a minimum of waste, expense, and unnecessary effort; doing things right.

- Effectiveness -- producing the desired effect; doing the right things.

- The ability to maintain effectiveness and efficiency over the long run, which requires:

    a. satisfaction in your work, and

    b. life balance.

Time management is really self-management with respect to time. Therefore, a key component of time management is the ability to change your attitude and choices about organization and efficiency. There are only two underlying reasons why you use your time in a certain manner: either (1) you have made a conscious choice to use your time to engage in a particular activity in order to achieve a particular outcome, or (2) you have not made a conscious choice about your use of time, and are making your time use decisions by default or "going with the flow," and doing whatever occurs to you at any given moment. The more often you make a conscious choice to engage in activities that you believe will move you efficiently towards your desired outcome, the more efficient and effective you are likely to be.

I. GETTING AND STAYING ORGANIZED

Some secrets of organization:

- Being organized is not an end in itself; it is only a means of getting things done as quickly and easily as possible.

- Being organized is a process, not a fixed state.

- There is no one best way to be organized; there are many good ways. Don't waste time figuring out which approach is marginally better than another.

- How organized should you be? Just as much as is truly helpful in making your work go smoothly, and no more. Organization for its own sake is a waste of time. Aim for imperfect but adequate methods of organization.

A. Managing Paper, E-mail, Voicemail, and Other Information

When dealing with the daily paper flow, touch each item as few times as possible. If it's possible to fully process the item when you first pick it up, do so. If the task is too long to complete the first time you pick up the item, either log the task on your master "to do" list, or schedule a specific time to do it. Don't put anything down except in a predetermined place, such as:

- In the wastebasket (or recycling bin).
- In your "out" tray
- In your "pending" tray if you cannot do anything more about the item at the moment (for example, if you're waiting for a return phone call).
- In your tickler file under the appropriate day/month/year.
- In the proper client file, project file, or reference file. Create a new file if necessary. (If you don't do your own filing, put items to be filed in a "to file" tray, with the file name or number written legibly in the upper right hand corner of the first page of the document.)
- In your "to read" file (or pile). For magazines and journals, peruse the item and its table of contents, and clip or copy items of interest rather than tossing the entire item in the "to read" pile.
- Any other logical, predetermined location that's part of your system of organization.

For example:

- For short memos, notes and letters: if possible, respond to the item with a brief message written in the margin, or make a note on your daily "to do" list to call the person.
- For project-related items and items you want to keep as reference: file the item, or write the name of the reference file (or the client/project file) on a corner of the document and put it in your "to file" tray.
- For invitations, announcements, and minor informational memos: put the pertinent information on your calendar, and either throw the item away or put in your tickler file so it will appear on the appropriate day.
- For professional reading: decide which longer items you want to read in full, and put just those items for your "to read" file. Read shorter items at once.

Some timesaving techniques for e-mail:

- Fully process your e-mail before addressing any substantive issues.

- Ideally, reserve your e-mail in-box for e-mails you haven't read yet. If you don't act upon an e-mail upon reading it the first time, move it to another folder to await further action.

- Unless you are awaiting an important e-mail, don't check your in-box each time a new e-mail arrives. Wait until you have finished your current task, or have reached a reasonable stopping point, and then process all the e-mails that have appeared since the last time you checked your in-box.

- Create and use templates to deal with similar substantive e-mails. Brainstorm other methods to streamline your responses. (E.g., instead of reviewing and commenting on five similar contracts from the same person each week, arrange a weekly meeting or telecon so you can explain you responses orally and answer any questions in real time.)

- Appendix A contains further suggestions for managing e-mail.

Some timesaving techniques for using the telephone and voicemail:

- Minimize telephone tag by including in your messages the best times to reach you.

- Make telephone appointments.

- Try calling early in the morning, at lunch time, or towards the end of the day.

- Before initiating a call, write out a phone agenda.

- Return all your non-urgent, non-important calls at the same time. Try 11:30 to 12:00, and/or 4:00 to 4:30 to minimize potentially lengthy calls.

- Keep a spiral notebook by the phone and write information and notes in it rather than on scraps of paper. (This can be very helpful at home too.)

- Leave reminders for yourself on your answering machine at home. For early-morning reminders, follow up with strategically-placed sticky notes at home.

- Invest the time to become proficient with the voicemail system. Keep your outgoing message up-to-date, and be sure to include brief directions to allow callers various options, such as bypassing your outgoing message and contacting the operator.

- When you're away from the office for a long period of time, be sure your outgoing message includes your estimated time of return; whether or not you will be checking your messages; and the name and extension of someone who may be of assistance in your absence.

- Avoid extraneous information, such as "I'm either on another line or not at my desk right now," in your outgoing greeting.

- When leaving voicemail messages, include at least the following:

  - your name, telephone number, and day and time of the call;

  - your reason for calling;

  - the times when a return call is most likely to reach you;

  - a fairly slow repetition of your telephone number.

B. Filing Systems: How to Transition from Piles to Files

1. Project Files

Create a new Project File for each discrete project you work on. These are your "working" files; keep them in addition to any official files. Assign each project file a unique number, starting afresh each calendar year.

Describe each project by pertinent information, such as:

- name of case or matter;

- brief statement of the legal and/or factual questions at issue;

- month/year project came to you; and

- any identifying number (such as the client-matter number).

Write all descriptions assuming you will have total memory loss once the project is finished. Have this description printed out on a 2" by 4" label according to a standard format such as:

MSD-2010-08	Bd of Educ. v. Smith: Research re whether dismissing § 1983 claim for compensatory damages against the Bd members in their official capacity will prejudice § 1983 claim for compensatory and punitive damages against them in their personal capacity (January 2010; No. 8763-205)

Affix the label to the front of an redweld folder (cover label with wide clear tape to prevent smudging); write the full project number -- "MSD-2010-08" -- in big letters on the back rim of the folder, so that you can read it when the folder is in a file drawer.

For Project Files containing legal research, use alphabetical dividers within the file itself, and keep cases alphabetically (according to the name you use to refer to them in casual conver-

sation, not the official case name).

Keep a running list of your project files, to facilitate:

- keeping track of active files;
- keeping track of inactive files;
- putting files in off-site storage;
- retrieving files from off-site storage;
- label making;
- describing time worked; and
- summarizing work at review time.

The ideal placement for your Project Files (keep files in numerical order within each location) is as follows:

- the file you are working on: on your desk.
- other active files: in your office, but not on your desk.
- inactive files less than a year old: in file drawers near your office.
- inactive files more than a year old: off-site storage. Each January, transfer your inactive project files from the year before the one which just ended to off-site storage. (So inactive files from 2010 will go to off-site storage in January 2012.) Your "Project Files" list can be easily revised to create indexes of boxes sent to off-site storage. Put a copy of the index in the box; keep another copy in your Master Notebook.

Permanently maintain a Master Notebook containing a current copy of this year's Project List; Project Lists for years past; and indexes of contents of boxes sent to off-site storage. Post a list of your active Project Files on a bulletin board within easy sight of your desk.

2. Reference Files

Develop your own library of reference files on topics of your professional interest. For example, if you work in litigation, you might have files for complaints, injunctions, interrogatories, etc., combining models with articles and copies of important cases. Ask colleagues for samples, handouts, etc.; keep your eyes open for possible items to include. These reference files can be a major time-saver in an emergency.

Keep file names simple. When naming files, think of what word or phrase is most likely to occur to you first when you think of the topic. If an item could just as easily be filed in one of

two files, don't agonize, just file it under either one (put a "see" sheet in second one if that makes you feel better). Be cautious about delegating the task of naming your reference files.

Keep subcategories simple. It's better to have fewer fatter files than more thin ones. Don't get compulsive about some inconsistencies. Aim for "imperfect but adequate."

Have your secretary maintain an index of your reference file system, updated regularly, with a copy affixed to the file site.

Keep the format easy and flexible: use simple 3-cut manila folders; file in alphabetical order; use hanging files; use alphabet markers to indicate where each letter subdivision begins. Have your secretary keep supplies of files and labels stocked and handy.

One special kind of reference file is an “official documents” file or binder. Depending on your practice, it would include -- in chronological order -- the final, executed documents in connection with the relevant transaction, or the final versions of pleadings and other documents as filed with the relevant court or regulatory body. The key to a useful “official documents” file is a detailed index that contains a unique description for each item, so that each item can be differentiated from all of the other items by reference to the index alone. For example, a good index to a pleadings file would specify "Plaintiff Smith's First Set of Interrogatories," not just "Interrogatories."

3. Tickler Files

A tickler file (also known as a follow-up file) is a handy adjunct to your calendar and filing system. Its purpose is twofold: (1) to provide a place to put those miscellaneous pieces of paper that don't quite belong in a client/project file or a reference file; and (2) to ensure that the information reappears at the appropriate time. A simple tickler file consists of forty-five folders:

- thirty-one folders labeled from 1 to 31
- twelve folders labeled from January to December
- one folder labeled "Next Year"
- one folder labeled "Beyond Next Year"

The numbered folders correspond to the days of the current month; the monthly folders correspond to the months of the current year.

Whenever you process an item which you want to reappear at some point in the future, write that future date on the upper right hand corner of the item, and file it as follows:

- In one of the numbered folders, if the "return" date falls sometime later in the current month

- In one of the monthly folders, if the "return" date falls sometime later in the current year

- In the "Next Year" or "Beyond Next Year," as appropriate.

N.B.: When filing an item in a numbered file, check a calendar to ensure that you are not inadvertently filing the item on a date that falls on a weekend or holiday.

To keep your tickler file up to date:

- Every day, empty the numbered file for that day. Thus all the numbered files up to today's date should be empty.

- On the first day of the month, remove all the items from the monthly folder for that month, and file them in the numbered files, as indicated by the date you wrote on each item. Thus all the monthly files up to the current month should be empty.

- Just before the beginning of a new year, take all the items from the "Next Year" file, and file them in the monthly folder for the month indicated by the date you wrote on each item. Also, move up items from the "Beyond Next Year" file to the "New Year" file as appropriate.

C. Organizing Your To-Do List

A comprehensive, reliable, relatively simple to-do system should be at the core of every lawyer's organizational routine. Having such a system – and using it consistently – will help you control your workload, track deadlines, manage delegated tasks, juggle multiple projects, and allocate adequate time to non-deadline-driven tasks.

A simple approach to organizing your to-do system is to use just two lists: one for tasks you want to work on in the shorter-term, and another for tasks you want to work on (or consider working on) in the longer-term.

- Define "shorter-term" and "longer-term" in any way that makes sense for you. (One reasonable approach would be to define "shorter-term" as "within the next week or so" and "longer-term" as anything beyond that.)

- Review your longer-term task list regularly (at least weekly), and move items to the shorter-term list when appropriate.

- Experiment to find the format that works best for you: handwritten; word-processed; or using software such as Outlook (especially the Task function). But remember that the format in which you keep your lists is less important than keeping the lists up-to-date and referring to them regularly.

- Appendix B contains many specific suggestions for creating and maintaining your to-do system.

D. Good Organization Habits

- Check your tickler file first thing every day.
- Go through your "pending tray" once a day and process as much as you can.
- Do a quick "desk sweep" once a day.
- Keep your desk clear of all papers except those directly involved in the project you're working on.
- Prevent clutter from accumulating by allowing enough time in your schedule every day to fully process the incoming mail (including voicemail).
- Aim towards the eventual goal of having no "unfinished business."
- When clutter does accumulate (as it will from time to time; you're only human) either deal with the backlog in one fell swoop (say, on a Saturday) or schedule an hour a day to focus on the backlog until it's entirely gone. Don't wait until the backlog is gone to go back to processing your daily mail.
- Consider the time spent "decluttering" your office as an investment that will pay off in the future.

II. TIME MANAGEMENT THROUGHOUT THE DAY

A. Keeping Accurate Time Records

The only way to keep accurate time records is to keep track of your work "as you go." The most efficient way to do this is to learn how to use the timers that are contained in your time-billing system. Alternatively, adopt or adapt an efficient paper time-log that includes room to write down "start" and "end" times each time you switch activities. At the end of the day, calculate the time accumulated for each client-matter number (or have your time log copied for your secretary to use to calculate your billable time each day) and flesh out the descriptions of work performed.

It's worth the effort to develop the habit of either using the timers, or jotting down the time (to the minute) whenever you start, end, or switch tasks. **This habit takes only seconds and will provide you and your firm with crucial and valuable information that will otherwise be lost forever.**

B. Managing Interruptions

Define interruptions with reference to the key goals of your job. Some interruptions are simply part of your job. Plan your daily schedule in light of expected interruptions. Take personal responsibility for allowing others to interrupt you.

External interruptions usually involve people, in person or by telephone. Being available for others versus being able to concentrate on work-alone projects requires constant balancing. Maintaining good interpersonal working relationships requires time; dealing with poor interpersonal working relationships also requires time.

When interruptions occur, triage them quickly, and decide whether changed circumstances warrant changing your daily plan. People are important; the issues they raise may not be important. Be gracious with people but decisive with issues.

Here's a three part strategy for coping with external interruptions:

(a) Minimizing the number of interruptions --

- Set a good example. Be considerate of others. Don't interrupt them; set up appointments for non-emergency matters.
- Let the voicemail system screen your calls. Respond immediately to clients, partners, and emergencies, and discipline yourself to wait until you've finished your self-assigned task before responding to everyone else.
- If possible, take your work to an empty office, conference room, or a remote location in the library or cafeteria.
- Arrange your office furniture so that it is difficult for would-be drop-in visitors to catch your eye.
- Keep a log of interruptions for a few days to diagnose the underlying problems. Pertinent data are: who, when, why, how long, and priority (importance/urgency). See if any patterns exist.

(b) Minimizing the length of interruptions --

- Be up-front with drop-in visitors and unexpected callers: "I'm in the middle of a project right now; is this an emergency or can I get back to you at [specific time]?"
- Stand up when drop-in visitor enters: "Walk me to the coffee machine?"
- Keep track of the length of social phone calls you decide to take as a break; have a predetermined length in mind. Close with: "I'll let you get back to work now."

(c) Minimizing transition time to return to the work at hand:

- Use Post-It™ notes to indicate stopping points.
- Stop writing in the middle of a sentence.
- Make a note on your "to do" list.

Internal interruptions are those we generate ourselves, such as getting distracted, day-dreaming, worrying.

- Minimize clutter to prevent distraction. Try keeping your "in" box on a shelf or credenza. Keep your running "to do" list at hand.
- Allow time to relax mentally at some point during the day.
- Keep a list of things that occur to you while you are working.
- Use problem-solving skills to deal with worry in writing. What would you advise a friend who came to you with the same problem? Consider: can you remember what you were worrying about at this time last year? How much of what you were worrying about came to pass?
- Have realistic expectations.

All of these suggestions will be easier to implement once you have created a master planning list, and are working from a short-term "to-do" list.

C. Effective Delegation

Whenever possible, leverage yourself. Don't do tasks that others can do, or can be trained to do. Ideally, you should be doing only those tasks which only you can do. Encourage work to be done at the lowest possible level. Consider training time as an investment of your time. It will pay off in the future.

Steps in delegating:

- Select the person who has the ability to do the job, or to learn to do it.
- Clearly communicate the objectives and parameters of the project. Direct the delegatee to appropriate resources. Be certain the person understands your expectations.
- Negotiate deadlines and follow-up procedures. Confirm in writing unless you've had positive experiences with the delegatee in the past.
- Let go of the project. Allow delegatee the latitude to use his or her own creativity and methods as long as they are within the parameters you have set. Delegate the objective, not the process.

- Resist reverse delegation. Be available for guidance and assistance in brainstorming, but steer the delegatee toward resolving problems himself.

Include deadlines and follow-up dates for each delegatee within your own calendar and task management system, so that you will know to contact the delegatee if a deadline or follow-up date is not met.

If you delegate multiple tasks to multiple delegatees, it can be very helpful to maintain a simple delegation log that includes (1) a list of delegated tasks or projects indicating to whom the task or project was delegated, and (2) a log for each delegatee, listing that delegatee's tasks or projects by description and status. This can also be a handy place to include your notes in preparation for completing that delegatee's annual review.

When you're the delegatee:

- Ask questions; communicate your concerns. Asking intelligent questions (and if you have a question, the chances are good that it is indeed an intelligent one) may reveal your inexperience, but asking those questions is the best and fastest way to learn -- while failing to ask those questions can be a recipe for disaster.

- Monitor your workload so that you don't end up taking on so much work that you cannot complete it all in a timely fashion.

- Let the partner know promptly once you realize you may not be able to meet any deadline, or when you realize that simply staying late every night still won't allow you to get everything done on time. The sooner you communicate this information, the more time you and the partner have to talk things through and work things out.

III. MAINTAINING MOMENTUM

A. Keeping Your Life in Balance

A powerful way to improve the balance in your life is to invest the time to plan on a weekly basis. During your weekly planning session:

- Review your long term goals.

- Review your goals for the past week and assess your progress towards making them. Ask yourself what went well, what could stand some improvement, and brainstorm ways of making that improvement. Which goals did you achieve, and why? Which goals didn't you achieve, and why not?

- Review your "sources of work.”

- Review anything else you want to keep fresh in your mind, such as your lessons learned.

- Create this week's to-do plan.

- Create this week's time blueprint.

Create and maintain a list of goals for your life outside of work. "Sharpen the saw" by making a conscious choice to counter-balance work with regular rest, fun, recreation, and vacations. Set aside one day a week to do no work of any kind. Take an "at-home" vacation once a month by blocking off an entire weekend and making no outside commitments. Develop and indulge regularly in forms of recreation that you truly enjoy. If you find it difficult to relax, consider this kind of rest and relaxation to be a strategic investment of your time that will pay off in greater energy and motivation when you return to work.

B. Minimizing Procrastination

Procrastination is wily; only you can tell when you're really procrastinating. For serious procrastination, try adjusting your thinking along one or more of these points:[1]

Unhelpful Mindset	Helpful Mindset
"I must...."	"I choose to...."
"I have to finish."	"When can I start?"
"This project is huge."	"I'll do one small task."
"I have to be perfect."	"I can be human."
"I'll have time for rest, fun, and relaxation when this project is done."	"I must make time for rest, fun, and relaxation no matter how busy I am."

Other techniques for dealing with procrastination:

- Start anywhere**.** Most work projects have many places to start, each of which is about as good as the other. Yet frequently we deter ourselves from starting at all because we can't decide on the best place to start, and lose sight of the fact that just starting anywhere is better than not starting at all.

- Start even if you're not in the mood**.** You don't have to be inspired before you start on something. If you wait for inspiration, you run the risk that it might never show up at all. It's more reliable to train yourself to start to work at a specific time and place, then see if the ideas start to flow.

[1] This analysis is adapted from Neil Fiore, The Now Habit: A Strategic Program for Overcoming Procrastination and Enjoying Guilt-Free Play (Los Angeles: Jeremy P. Tarcher, Inc., 1989), pp. 61-67.

> *When inspiration does not come to me, I go halfway to meet it.*
>
> *Sigmund Freud*

- Realize that unpleasant tasks don't get any easier over time. If anything, unpleasant tasks become more so when we put them off. Even worse, the worrying and agonizing about not working on a project take at least as much energy as just getting on with the task.

- Schedule a catch-up day. Every month or so, set aside a day devoted entirely to those small tasks you have been putting off.

- Ways to deal with writer's block:
  - Begin in the middle.
  - Outline after you draft.
  - Write out your analysis stream-of-consciousness style, then organize it.
  - The letter-writing approach: "Dear Mom: Here I am in the office struggling to write summarize this deposition. These are the subjects the witness covered ...."

- Work no more than fifteen minutes at a time. Set a timer -- a wristwatch alarm is a discreet alternative -- and decide to work full blast on the project for the next fifteen minutes. When the timer goes off, decide immediately whether to stop at that moment, or to reset the timer and work for another fifteen minutes.

CONCLUSION AND CHALLENGES

There are no shortcuts to effective time management, but now you know the basic paths. Focus on improving one time management habit at a time. When you've successfully incorporated that habit, start to work on another. Aim for slow, steady, continuous improvement over the long term.

> *To enjoy life is to enjoy time. For time is the stuff life is made of.*
>
> *Benjamin Franklin*

APPENDIX A

Tips for E-Mail Management

1. Strive to **fully process all newly-arrived e-mail**: open every non-spam e-mail, and quickly skim it and decide whether to (a) delete it, (b) respond immediately; (c) respond later; or (d) file it (with no further action required).

2. **Use the two-minute principle for processing e-mail**: if you can complete the associated task within two minutes or less, go ahead and respond to the e-mail the first time you open it. If you can't (or don't) complete the associated task, use one of the following techniques to keep track of e-mails requiring a response.

3. To keep track of e-mails requiring a response, but to which you can't (or don't) respond immediately, use <u>one</u> of the following approaches so that you can locate pending e-mails quickly when you have time to deal with them. Whichever variation you use, consider these e-mails to be part of your shorter-term to-do list.

    a. **Keep pending e-mails open but minimized** at the bottom of your screen.

    b. Or **attach a flag to pending e-mails in your inbox**.

    c. Or **save only pending e-mails in your inbox**, making sure to move all other e-mails from your inbox to the appropriate folder (or to delete them).

    d. Or **save pending e-mails in an electronic e-mail folder entitled "Action."**

4. <u>If you use Microsoft Outlook</u>: To consolidate your virtual to-do list consisting of e-mails awaiting your response (wherever you may keep them) into a real to-do list, consider taking a few seconds to **add a task to your Outlook Task list by dragging the e-mail to the Task button** in your Outlook Navigation Pane.

    a. Dragging the e-mail while holding the <u>left</u>-click button creates a new Task with the "re" line of the task in the Subject line of the Task, and <u>copies the text of the entire e-mail into the notes field for the Task</u>. (Take a few moments to rewrite the description of the task if the e-mail's "re" line doesn't clearly reflect your responsive task.)

    b. Dragging the e-mail while holding the <u>right</u>-click button give you the option of creating a new Task with the "re" line of the e-mail copied into in the subject line of the Task, <u>with the e-mail itself inserted as an attachment to the Task</u>. This option is handy when you want to be able to reply to that specific e-mail again, and/or when the e-mail has an attachment itself. (Again, take a few moments to rewrite the description of the task if the e-mail's "re" line doesn't clearly reflect your responsive task.)

c. Note that whether you left-click or right-click, dragging an e-mail to the Task button does not automatically delete the e-mail.[1]

5. **Include in your shorter-term to-do list all follow-up tasks generated by e-mails you send**.

6. If you use Microsoft Outlook: To organize processed e-mails, use Outlook categories (instead of keeping separate folders for each case or project)

   a. **Save all your processed e-mail in a folder called "Processed Mail"** and then:

   b. **Use Outlook categories to keep track of processed e-mails**. To categorize an e-mail, right-click on an e-mail listed in your Outlook inbox, select "Categories," and select or type in the category or categories you wish to assign to the e-mail. (To add new categories, select "Master Category List," and insert as many categories as you need, clicking "Add" after each one, and "Okay" once you've finished.) One valuable benefit of using Outlook categories instead of folders is that you can quickly and easily assign multiple categories to a single e-mail. (And then, of course, you can view the e-mails sorted by category.) Nor must you categorize every e-mail; uncategorized e-mails are automatically included in a category titled "None," so there's no need to create a catch-all category such as "Miscellaneous" or "Other."

7. Another option is to **save important e-mails along with your regular, non-mail documents** in your document management system.

8. If you use Microsoft Outlook: **Use Outlook rules to filter routine and administrative e-mails directly into specific e-mail folders**. Some lawyers prefer this approach; others prefer to have all e-mails flow through their regular inbox so that they're aware of them.

[1] However, right-clicking gives you the option of choosing to move the e-mail to Tasks (instead of simply copying it to Tasks) which does delete the e-mail. (But you can still restore the e-mail by dragging it from the "Deleted Items" file back to your "Inbox" file.)

APPENDIX B

Tips for Task Management

1. To keep track of short-term tasks, and to ensure that nothing "falls through the cracks," take a few minutes every day (or at least whenever you feel that things are getting out of control) to jot down a quick to-do list in some form:

   a. **Use a simple, hand-written to-do list**. Write "Case X" then jot down the things you need to do (call someone; draft this; review that), leave some blank lines for adding in tasks later, then repeat the same process for "Project Y" and all of your other ongoing cases and projects. Add tasks as you think of them; cross them off when done; rewrite the list when it gets annoyingly messy.

   b. Or **use a simple, word-processed to-do list**. Instead of hand-writing your list, use a word-processing program such as Word. Some lawyers like to keep their daily list in the text field in an undated event (titled "To Do") in their Outlook calendar for each day.

   c. Or **use a simple to-do list in software such as Microsoft Outlook, especially the Task function** if you are -- or want to become -- familiar with that function. Use the "due date" field as the date you want the task to appear on your daily to-do list (i.e., the date you want to do the task or to consider doing the task). Create a view for all tasks due on or before "today".[1]

2. If you like the immediacy, tangibility, and portability of a handwritten to-do list, you can always **print out your list**.

3. Whatever format you use for your short-term to-do list, **include personal items in your to-do list** as well (e.g., mail taxes, send birthday card).

4. Try to **begin each task description with a verb** (call, review, e-mail, draft, analyze, etc.) In other words, **decide on your next action** in connection with the project.

5. When writing a task description, be certain to **decide on your <u>very</u> next action.** Keep asking yourself, "Is there anything I need to do first?" Often, one balks at starting a task because there's really another task that must be done first.

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[1] Starting in the Outlook Task toolbar, select View / Current View / Define Views / New / then name the new view whatever you want, say "Tasks for Today" / OK / Filter / Advanced / Field / Frequently-used Fields / Due Date / then under "Condition" select "on or before" and under "Value" type "today" / Add to List / OK / OK (again) / Apply View. If you've been using Outlook tasks, you'll see that this view includes completed tasks. To remove them from the view: starting in the Outlook Task toolbar, select View / Current View / Customize Current View / Filter / Advanced / Field / Frequently-used Fields / % Complete / then under "Condition" select "is less than" and under "Value" type "100" / Add to List / OK / OK. (And if you still want to view your completed (but not yet deleted) Tasks, they're still there under the pre-installed view entitled "Completed Tasks".)

6. **Keep track of deadlines by including the deadline in the description of the task** on your short-term to-do list, including whether it's a hard deadline, an internal deadline, a promise to a colleague, etc.

7. When something occurs to you (or if you receive a task) when you're away from your desk, immediately:

    a. **Capture the idea by inserting it as an event in your calendar**; the Outlook event will then serve as a reminder to insert the item on your primary to-do list when you return to your desk.

    b. Or **capture the idea by sending an e-mail to yourself**.

    c. Or **capture the idea by leaving a voice-mail for yourself**.

    d. Or **capture the idea by inserting it directly in your Task list**.

    e. Or **capture the idea by writing it down**, ideally in one definite place such as a notebook, note pad, 3x5 card, then as soon as you return to your desk, insert the task in your to do list.

8. **Insert ALL appointments and deadlines in your Outlook Calendar**, and attach reminders with appropriate lead times for all important appointments and deadlines.

9. It can be helpful to **keep all notes, reminders, and to-do lists in a notebook**; essentially a running, chronological day-to-day log of your work. Carry this notebook with you whenever you are away from your desk.[2] Highlight follow-up tasks that are buried within meeting notes; review your notes frequently; cross out or check off completed tasks; insert events in your Outlook Calendar; insert tasks in your handwritten list or Outlook Task list.

10. It can be helpful to **use one particular notebook for hand writing notes when you're on the phone**, rather than trying to take notes on your computer, or taking the time to grab the legal pad you're using for that case, or starting a new legal pad with each call. If any of your notes require follow-up action on your part, either do the task immediately (and indicate this in your notebook in some consistent manner), or insert the task in your short-term or long-term to-do list system (and indicate this in your notebook in some consistent manner as well).

11. To indicate that a follow-up task is embedded in handwritten notes, **use the "box" technique**: while you're taking the notes, draw an empty box in the margin next to the part of the notes that incorporate the follow-up task. At the end of the meeting or conference call, instead of having to read through all of your notes, just look for the empty boxes. Then:

    a. **Put a check mark in the box when you complete the task**, or

[2] You can purchase black leather covers for these notebooks; see, e.g., www.levenger.com.

b. **Put a horizontal arrow in the box when you move the task** to your to do list.

12. **Use the Outlook Task (or Calendar) function for follow-up self-reminders.** If you're expecting to hear back from someone, or to receive a document by a certain date, insert a task (or event) on the follow-up date to "Contact If Haven't Heard" (CIHH) or "Contact If Haven't Received" (CIHR).

13. **Use consistent abbreviations** so you can **use the search function to locate pending reminders** in Outlook.

14. **Use the Outlook Task function to remind yourself to follow-up with delegatees.**

    a. **Begin the description of the task with the name of the case or project** so that you can sort your tasks by case or project.

    b. **Use consistent terms that allow you to use the search function to view certain categories of tasks** such as "Delegated", or Delegated - John Smith.

    c. **Create one Outlook Task to follow up with a particular delegatee**, and then each time you follow up with him or her, simply update the Task's due date to the next time you want to remind yourself to follow up.

    d. **Use the Task's text box to list things** you want to remember to mention to the delegatee at your next follow-up session.

15. **Use an asterisk at the end of the Outlook Task subject line to indicate that there is text in the text box** below, so that when you're viewing your tasks in list view, you can tell whether you need to open the Task box to see any further information.

16. Try to **consolidate your shorter-term to do list into one format** (handwritten, word-processed, or Outlook Tasks), so you can easily see everything that needs to be done, which makes it easier to prioritize tasks and juggle multiple projects.

17. **Use your shorter-term to-do list as your initial game plan** each day, but be ready to change it as events unfold throughout the day.

18. Whatever system you use for short-term tasks, also **keep track of longer-term tasks** (i.e., tasks you are not going to do -- or to consider doing -- for at least a week or so).

    a. Either **maintain a handwritten longer-term task list**, or:

    b. **Maintain a simple, word-processed, to-do list**. Instead of hand-writing your list, use a word-processing program such as Word. Some lawyers like to keep their daily list in the text field in an undated event (titled "To Do") in their Outlook calendar for each day, or:

    c. **Use the Outlook Task function for your longer-term task list.** The Outlook task function is ideal for this purpose. Just remember to check your Outlook Task

function periodically (weekly is ideal), and it becomes the perfect place to park tasks that you don't need to do (or think about) for weeks or even months

19. If you use the Outlook Task function to keep track of your shorter-term tasks, you can easily differentiate between shorter- and longer-term tasks by simply **not assigning a due date to longer-term tasks**. This way, your daily to-do list won't be cluttered up with longer-term tasks, but they will still be easily accessible within one of the pre-existing views (such as "By Category") in Outlook.

20. **Review your longer-term task list every week or so.** When items from your longer-term task list are ready to go to your shorter-term task list, either:

    a. **re-write them onto your handwritten list**, or

    b. **copy-and-paste them from your longer-term list to your shorter-term list**, or

    c. if you use the Outlook Task function for both your shorter-term and longer-term tasks, simply **add a due date for the Outlook Task**.

21. **Keep "Review Longer-Term Task List" as a task in your shorter-term task list** as a reminder.

    a. If you use the Outlook Task function for your shorter-term tasks, each time you review your longer-term task list, simply **re-assign the reminder's due date** to the following week.

22. **Use your longer-term task list as a "data dump"** for anything and everything that isn't yet ready for your shorter-term task list. For example, if you already know many of the tasks you'll have to do at some point in connection with a particular case or project, include those tasks in your longer-term task list.

    a. If you use the Outlook Task function for your longer-term tasks, **insert the name of the project in the subject line** of the Outlook Task, and insert the specific task description in the text box below. (This list is, in effect, your project-specific task list.)

    b. If you use the Outlook Task function for both your longer- and shorter-term tasks, when a project's specific task is ready to move to your shorter-term Outlook Task list, simply **copy and paste the text into a newly-created Outlook Task,** and assign it a due date.

23. You can also **use the Outlook Task function to keep track of things to "keep in mind"** but which do not yet require a definite action on your part. Differentiate "keep-in-minds" from tasks to do by prefacing the "keep-in-mind" with "KIM".

24. **Have weekly planning sessions with yourself** during which you review and update your longer-term to-do list (moving items to your shorter-term list as necessary), your calendar for the next few weeks, and any other resources you use to track items tasks. Investing

the time to preview your upcoming tasks will help you get and stay on top of your workload, as well as help you identify possible problems and conflicting demands before they become emergencies.

APPENDIX C

Articles on Time Management for Lawyers
by Margaret Spencer Dixon

Time Management: An Essential Skill for the Successful Lawyer, ABA, *Lawyering Skills Bulletin*, Vol. 3, No. 2 (Winter 1993)

Time Management Habits: How to Develop Good Ones and Kick Bad Ones, ABA, *Lawyering Skills Bulletin*, Vol. 4, No. 2 (Winter 1994)

Yes, You Can Learn to Keep Your Desk Clutter-Free, ABA, *Lawyering Skills Bulletin*, Vol. 3, No. 4 (Summer 1993)

Overcoming Procrastination: How to Get Things Done Despite Yourself, ABA, *Lawyering Skills Bulletin*, Vol. 6, No. 3 (Spring 1996)

Timesaving Telephone Techniques, ABA, *Lawyering Skills Bulletin*, Vol. 7, No. 1 (Fall 1996)

How to Create the Perfect Organizer, ABA, *Lawyering Skills Bulletin*, Vol. 7, No. 4 (Summer 1997)

How to Delegate, ACLEA (Association for Continuing Legal Education) Newsletter *In The Loop*, (Vol. 20, No. 3) (Fall 1999)

Ten Tips for Using Technology Efficiently Without Letting It Run Your Life, *Professional Development Quarterly* (February 2000)

Tips for Using Microsoft Outlook To Manage Your "To-Do" Lists (unpublished)

Tips for Using Word To-Do Lists With Outlook Tasks (unpublished)

Windows Quick Keys & Other Keyboard Timesavers (unpublished)

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Time Management: An Essential Skill for the Successful Lawyer

by Margaret Spencer Dixon, Esq.

Of all the elements everyone has to work with, none is more precious than time. Lawyers' abilities to manage their time directly affects the standard and quantity of their legal work, the quality of their service to their clients, and their own job satisfaction. Especially in the current competitive legal environment, lawyers' time management skills significantly affect the degree of their professional success.

In this series of articles on time management, we will discuss various techniques for managing time, paper, projects, and people (including yourself). The goal of these articles is to provide you with information that will help you produce high quality legal work effectively, efficiently, and with a minimum of stress. Specifically, we plan to: articulate the challenges of time management in order to provide a framework for you to analyze and improve your own time management skills; and outline specific, practical time management techniques.

Here are few common time management challenges and techniques for dealing with them:

Handling Paper

Dealing with the continuous flow of paper through your office is a fact of professional life. Who hasn't experienced that sinking feeling upon seeing the enormous pile in the in-box after only a few days away from the office? Without an effective plan for dealing with paper, it can easily get out of hand, cluttering your desk (and credenza, and shelves and floor), making it impossible to find the few truly important items.

Some suggestions for weathering the paper blizzard:

- The most important tool in handling paper effectively is your wastebasket. When deciding whether to keep or toss an item, be very selective about what you save. The key question should be, "Is there anywhere else I can find this information if I need it later?" It should not be, "Is there any chance I might want to look at this again?" It's probably safe to toss most of the paper that crosses your desk.

- Once you have decided that a document is worth saving, the question becomes, "Where do I put it so that I can find it again easily?" A key principle for filing systems is *keep it simple*. A personal anecdote is illustrative: a brilliant but self-admittedly disorganized partner at a firm where I worked confessed to me recently that his short-lived attempt at organizing his files ended when he was stumped by a document that logically could have fit in any of several files.

  In other words, it's better to have a few fat files than many thin ones. Not only is filing easier (thus making it more likely that the documents will actually get filed, rather than languishing in the "to file" pile), but riffling through one of your files to find an item now and then will keep you up-to-date on its contents.

  The best filing technique, of course, is to have a scrupulously organized, devoted secretary who never gets sick and who plans never to leave your employ. Failing this, however, it's a good idea to have at least a passing acquaintance with your filing system.

Telephone Use

While the problem of telephone tag has been somewhat lessened by the advent of voicemail, all of us have played that annoying but sometimes spirited game. The following suggestions should make it easier for you to make contact with your prey, as well as make your telephone a more effective business tool.

- When you leave a message for someone to return a call, include the specific time or times that you are most likely to be available to take the return call.

- It's easy to get sidetracked during a conversation, so take a moment before you place a call to jot down the topics you want to cover. Having a written agenda will prevent the "I'll call you back when I remember" syndrome. This technique is especially useful for recordkeeping purposes if you write this agenda in your

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usual daybook, rather than on a random scrap of paper.

- If your office uses a voicemail system, learn how to send time-delayed messages to yourself regarding meetings and appointments throughout the day. Knowing that you will be reminded at a specific time to get to a meeting leaves you free to concentrate on the work at hand. Here is another self-reminder technique to ensure that you remember breakfast meetings: leave a message on your answering machine at home on the day before the meeting that tells you to stick a reminder about the meeting on the bathroom mirror (where even the most bleary-eyed can't miss it).

Procrastination

Everyone procrastinates sometimes. The insidious thing about procrastination is that only you know when you are really procrastinating. Getting a cup of coffee, stopping by a friend's office to chat, or even working industriously on a low priority project are typical methods of procrastination.

Some suggestions for dealing with procrastination:

- **The "start anywhere" approach.** Don't worry about finding the best place to start, just start anywhere. If you're a perfectionist, try starting with an obvious mistake (to be edited out later), just so you're not frozen by the idea that your first draft has to be perfect. It's far easier to get something down on paper and then revise it than it is to try to get everything exactly right the first time.

- **The "drive yourself crazy by doing nothing" approach.** Assemble all the materials for your project, arrange them in front of you on your desk, and *do nothing* for seven minutes (by the clock). Don't even write down any of the ideas that are sure to come to you during this period. By the end of the seven minutes, you'll be itching to start. Incidentally, the reason for the seven minutes is to make sure that you sit there for seven actual minutes. "Five minutes" or "10 minutes" tend to become concepts rather than actual time periods.

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Time Management Habits: How to Develop Good Ones and Kick Bad Ones

by Margaret Spencer Dixon, Esq.

> Habit is the flywheel of society, its most precious conserving agent…. The more of the details of our daily life we can hand over to the effortless custody of automatism, the more our higher powers of mind will be set free for their proper work. There is no more miserable person than one in whom nothing is habitual but indecision, and for whom the lighting of every cigar, the drinking of every cup, the time of rising and going to bed every day, and the beginning of every bit of work, are subjects of deliberation. Half the time of such a man goes to deciding or regretting matters which ought not to exist for his consciousness at all.
>
> -- William James

All of us are creatures of habit. The $64,000 question is: do your particular habits help you or hurt you? It is equally important to question whether you have consciously chosen which habits to cultivate and which to avoid. Have you unwittingly fallen into patterns of behavior simply because it has not occurred to you to question whether it would be worthwhile to try to change them?

This article will discuss three common habits that harm professional effectiveness: perfectionism, worrying, and postponing pleasure. Then, we will talk about how to change bad habits and cultivate good ones.

When Bad Habits Happen to Good People

Some of our most insidious bad habits sneak up on us because they are simply good habits taken to an extreme, or otherwise applied inappropriately. Here are some examples.

1. **The habit of perfectionism.** "I'm a perfectionist," you confess (or brag?) to your colleagues. "I'd never have gotten this far if I weren't." Yet there is a difference between perfectionism and excellence, and it involves knowing when to exercise your perfectionism and when good enough really is good enough. While it is important to spend your time and talent on producing a clearly written, well-polished brief, applying the same kind of energy on a routine letter or in-house memorandum is probably not the most productive use of your efforts.

2. **The habit of worrying.** How often have you spent a lot of time and emotional energy worrying about something that might – or might not – occur? And, how often has your worrying had any effect on whatever you were worrying about? If your concern led you to take some constructive action – such as making a difficult decision or taking effective measures to prevent the unwanted outcome – then your worrying was worthwhile. Yet how often do we limit our fretting to that amount necessary to spur us to action? Not often. We waste enormous amounts of time on fruitless worry – resulting in reduced productivity and increased stress.

3. **The habit of postponing pleasure.** Most lawyers are so busy focusing on the next deposition, trial, or brief that all planned recreation and relaxation is postponed until after that work is finished. This approach works well – for a while. At some point, especially if you are extremely successful, you realize that there's always more work on the horizon. If your approach is "no play until you've finished all your work," it's easy to become overwhelmed and depressed. Practicing law is a marathon, not a sprint. In the not-so-long run, you will be more effective if you learn to pace yourself by scheduling at least minimal R&R, even during the crunch periods.

How to Change Your Habits

1. **Recognize your habits.** The first step to changing a habit is to be aware of it. This step is particularly important in connection with the three types of habits discussed earlier because these habits involve overusing traits which, when used appropriately, are necessary for professional success. Being aware of and concerned about problems and potential problems, paying attention to detail, and deferring gratification can be

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extremely positive traits. It is only when they are not kept within reasonable limits that they become negative habits. Realizing that our positive traits have developed into bad habits requires self-awareness, objectivity, and even some humility.

2. **Decide to change.** The second step is simply deciding to change the habit. Identify why you want to change, and point out to yourself both the advantages of changing (the carrot) and the disadvantages of not changing (the stick). Make a conscious determination that the costs of a particular behavior of yours outweigh its benefits. This serves three functions: (i) it helps you understand why you developed the habit in the first place; (ii) it buttresses your decision to change; and (iii) it motivates you to move away from the stick and toward the carrot.

3. **Decide how you want to change.** The third step is figuring out precisely how you want to change your behavior. Determine the specific situations in which you want to act differently and how you will act differently in those situations. For example, if your habit is perfectionism, decide how much attention to detail is appropriate for a particular project and how that attention should be focused. An internal memorandum, for example, might justify only one revision for style and content (and as many revisions as necessary to correct actual errors), while an appellate brief would justify multiple revisions for form and substance.

4. **Act on your decisions.** The fourth step is acting on these decisions. This is the tough part. Any change from the familiar is difficult, and it is particularly difficult to change behavior that is not appropriate in some situations while perfectly appropriate in others. Returning to the perfectionist example, if you are used to applying your high standards to all of your work, it can be very painful to decide that the effective use of your time requires you to refrain from focusing this talent on the lower priority items. At these difficult times, recharge your motivation to change by reminding yourself of the costs of unfettered perfectionism and the value of freeing up your time and energy to focus on the truly important items.

5. **Persist.** The fifth and final step in changing a habit is persistence. Do not expect that you will change completely, effortlessly, and overnight. Rather, expect that your progress will be sporadic. From time to time you will regress despite your good intentions. If you resolve from the outset to continue making the effort to change despite the inevitable difficulties, your ultimate success is practically assured.

Habits to Adopt

Now that you are on your way to eradicating your bad habits, here are some suggestions for good habits to adopt in their place. Use the same procedure to instill a good habit that you use to erase a bad one – decide, motivate yourself by articulating the benefits and costs of the habit, figure out how and when to change your behavior, act on your decision, and persist in acting on it despite setbacks. Consider adopting any or all of the following:

1. **Use a *three* item "daily action list."** If your "to-do" list runs to multiple pages, try picking only the three most important items. Focus on working on those items – and only those items – until you finish them. (Emergencies can muscle their way onto the list as newly-prioritized "most important" items.) Keep your longer "to-do" list for ease of future planning.

2. **Arrange for an hour or two of uninterrupted time every day during your high-energy periods.** Have your calls screened. Hide out in the library, or come in early. You can get much more accomplished during periods of high concentration, and knowing you can look forward to such times with reasonable certainty is a stress-buster by itself.

3. **Keep your office organized.** The costs of disorganization – in terms of time, stress, lost opportunities, and potential malpractice claims – are enormous. Set up a *simple* chronological filing system for your work projects, and a *simple* alphabetical filing system for miscellaneous in-

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formation, and develop the habit of using them consistently.

4. **Make minor decisions promptly.** Much of the paper clutter that builds up in your office is tangible evidence that you have been procrastinating on minor decisions. Check out the paper piled on your desk right now. How many of the items will you eventually resolve (whether by filing, tossing, or responding) without needing any additional information? Usually, all you have to do is make a decision – whether to attend the event, subscribe to the publication, respond to the request for a donation, etc. Resolve to get in the habit of making minor decisions at the first possible opportunity.

5. **Think on paper.** This good habit is especially useful in the following situations:

   - At the creative stages of projects, have your own private brainstorming session on paper, including even your most outlandish ideas.

   - For making decisions, draw a line down the center of a piece of paper and make two columns: pro and con.

   - For conquering the worry habit, write down the answers to these questions: Precisely what am I worried about? What, if anything, *can* I do about it? What *should* I do about it? (Make a pro and con chart if necessary.) When will I act on the decision?

The Most Important Habit

The habit of self-improvement is never-ending. The good news is that the moment you start working on reducing your bad habits or increasing your good ones, you have automatically begun the most important habit, that of monitoring your behavior in order to improve it – and yourself.

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Yes, You Can Learn To Keep Your Desk Clutter-Free

by Margaret Spencer Dixon, Esq.

Myth: A desk piled high with papers, notes, and reminders demonstrates that you are busy and productive. It is an effective way to keep on top of your work commitments, because "out of sight" means "out of mind."

Reality: In most cases, such clutter is a visual distraction that prevents you from concentrating fully on the task at hand. Those who work well at a disorganized desk probably do so in spite of the chaos, not because of it. Consistent use of a personal organizer, or at least a "to do" list and a calendar, is a more reliable way of keeping track of your projects and appointments.

What does your desk look like right now? Is it a neat, orderly surface conducive to efficient work and clear thinking? Or is it a repository for papers, projects, memos, advance sheets, legal magazines, Post-It notes, a half-eaten sandwich, and empty soda cans? Most likely, it vacillates between those two extremes. At times, it reflects the high-pressure, fast-paced nature of your practice. At other times (when the clutter has gone beyond the limits of what your eye can stand), it is immaculate – the result of several hundred dollars worth of billable time foregone while you tidied up the debris of your last few dozen projects.

Unless you are one of the few attorneys whose natural orderliness (or that of a devoted assistant) helps you maintain a working area which is well-organized and free of distracting clutter, it is time to consider changing your work habits to include keeping your desk clutter-free. Consider these benefits:

1. A tidy, well-organized work area will help you focus on the task at hand because there will be no papers, magazines, phone messages, or other items to distract you.

2. The items that you need to work on a particular project will be easy to find, because they were filed neatly away when you cleaned up your desk.

3. You won't have to worry about remembering appointments or work commitments, because you brought your "to-do" list and your calendar up-to-date as you cleaned up your desk.

4. You will no longer misplace papers, invitations, announcements, and other items whose temporary or permanent disappearance results in lost opportunities, frantic races to meet deadlines, or even missed deadlines and the threat of malpractice.

5. You will no longer spend frantic minutes going through piles of papers on your desk trying to find a crucial item that you must have to complete the project at hand. A survey has shown that people spend an average of 22 minutes a day looking for items on or around their desks. (Tracy, Declan, *Clear Your Desk!* Dover, New Hampshire: Dearborn Publishing Group, 1992 at 35.) At a billable rate of $150 an hour, this adds up to more than $12,000 a year.

6. Your desk will look, rightly or wrongly, as though it belongs to someone who is on top of her work and able to handle her responsibilities.

7. Your desk will reflect the calm-inducing beauty of orderliness, which in turn will reduce the level of stress you face every day.

Do these benefits outweigh the following costs of keeping an orderly desk?

1. It will take a measure of time and effort to achieve a clutter-free desk initially, and it will take a few minutes a day to maintain it.

2. You will no longer be able to illustrate – to yourself or to others – how busy you are based upon the height of the stacks of paper on your desk (and floor, credenza, shelves, etc.)

3. You will have to give up the adrenaline rush that comes from the exquisite relief of finally un-

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earthing a crucial document from the piles on your desk.

4. You will no longer have a ready-made excuse for missing opportunities to attend professional functions, because you will no longer misplace the announcement or invitation, only to rediscover it two days after the event has occurred.

How to Clean Up Your Desk
(A Step-by-Step Guide for the Organizationally-Challenged)

Have the following items at hand:

1. A few hours of low-pressure time during which you are unlikely to be interrupted. Weekend mornings are good, as is the "recovery" time after you've met a major deadline and your brain is not yet back in shape to deal with "real" work.

2. A wastebasket and recycling container.

3. A pad or two of sticky notes.

4. Two thick writing pads. Write "TO DO" at the top of one pad and "WORK PROJECTS" at the top of the other.

5. A pen or pencil.

6. Your personal organizer, or at least a pocket calendar.

7. One desk drawer with adequate room for office supplies.

A Plan

Sometimes the task of cleaning up your desk seems so overwhelming that a major stumbling block is figuring out where to begin. For simplicity's sake, here is an arbitrary plan that will take you over the hurdle: begin with the item nearest your telephone, and work clockwise around your desk until you reach your telephone again.

Pick up the one item nearest your telephone. (The only things that do not count as "items" for the purposes of this clean-up are: a telephone, a lamp, a computer, your pad of sticky notes, your two legal pads, your writing implements, and your personal organizer. That's it. Everything else is subject to this clean-up.) Handle each item once, relocating it according to the chart on page three of this article.

At the end of this process, your desktop will be clear, your calendar and Rolodex will be up-to-date, and your to-do list will be ready to be prioritized. All the paper that was on your desk is either in the wastebasket, recycling container, or in numbered or labeled piles on the floor. Use your WORK PROJECTS list to have file labels typed up for each project, and transfer the papers into the labeled files. The first character of each label should be the number of the project on your WORK PROJECTS list, which has now become the primary index to your project files. (It's a simple matter, using word processing, to create secondary indices cross-referenced according to client, case, subject matter, etc.) Your "Hold" and "To Read" items can also go in files, or can stay in neat stacks on a shelf near your desk.

Daily Maintenance

Every day – ideally, just before you go home – quickly go through the basic procedure outlined above. Starting at your telephone, pick up every item you come across and put it in its proper place or file, making notes on your calendar, to-do list, and Rolodex as you go. This is also a good time to check your calendar for tomorrow's appointments and to prepare your to-do list. With practice, you'll be able to sweep through these tasks very quickly. And the real joy comes in the mornings, when you arrive at the office ready to being your work day at a tidy, clutter-free desk.

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A STEP-BY-STEP GUIDE FOR THE ORGANIZATIONALLY CHALLENGED

IF THE ITEM IS A:	DO THIS:
Knickknack, photo, clock, plant, mug, pencil-holder, set of plastic teeth that chatter when you wind them up, etc.	Put it on a shelf or any surface that is not part of your work area. (Arrange your clock so you can see it from your desk, ideally just behind your guest chair so that you can glance at it discreetly.)
Pencil, pen, notepad, tape, stapler, staple-remover, letter-opener, paper clip, etc.	Put it in the drawer for office supplies. If you have stacks of writing pads, put them on a shelf within easy reach of your desk. If you have more office supplies than fit in your drawer, return them to the supply room.
Paper unrelated to a work project, such as invitations, announcements, dental appointment reminders, etc.	Insert the appropriate information on your calendar, to-do list, personal organizer and/or Rolodex, then throw the paper away. If you need the item to accomplish some action on your part, put a sticky note on the item saying “Hold” and place it on the floor. Add other “hold” items beneath the first one.
Potential reading material (unrelated to a specific work project)	Quickly skim the table of contents, decide which articles you want to read, and mark the appropriate pages with sticky notes. Put the item on the floor with a sticky note on top that says “To Read.” If nothing in the table of contents catches your eye, toss the item or send it along its routing path, as appropriate.
Paper related to a work project	Start a numbered list on the pad headed WORK PROJECTS. Identify the project by client, case, and/or subject matter. Write the number of each project on a sticky note, put the note on top of the paper, and put the paper on the floor. Continue numbering and describing projects on your WORK PROJECTS list as you pick up each piece of paper you come across. When you find a piece of paper related to a project you have already described, refer to your list, identify the project by number, and put the new item underneath the first piece of paper (so that you can still read the number on the sticky note). If the item requires action, make a note on your TO DO list; include a reference to the number of the project (according to the WORK PROJECTS list you are creating) so that you will know where to find the item when it is time to work on it.

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Overcoming Procrastination: How to Get Things Done Despite Yourself

by Margaret Spencer Dixon, Esq.

Everyone procrastinates sometimes. The insidious thing about procrastination is that only you know when you are really procrastinating. Getting a cup of coffee, stopping by a friend's office to chat, or even working industriously on a low-priority project are typical methods of putting things off. Here are some techniques to help procrastinators keep on track.

Nine Techniques for Overcoming Procrastination

1. **Don't try to do it all at once.** All too often, we procrastinate on starting a project because we won't have time to finish the whole thing in one sitting. This kind of all-or-nothing thinking is unhelpful, since we rarely have large chunks of free time miraculously appear before us. See how much you can accomplish by chipping away at a project for fifteen or twenty minutes at a time. Appreciate the cumulative value of small chunks of time: fifteen minutes every working day adds up to about 55 hours over the course of a year. This simple math can help us see the value of putting even small amounts of time to good use on a daily basis.

2. **Start anywhere.** Starting "at the very beginning – a very good place to start" makes senses when one is singing a song, which has only one logical place to start. Most work projects, however, have many good places to start, each of which is about as good as the other. Yet frequently we deter ourselves from starting at all because we can't decide on the best place to begin. We lose sight of the fact that just starting anywhere is better than not starting at all. So when you have been procrastinating on a big project, take the first step – just get started anywhere.

3. **Start imperfectly.** Another paralyzing mindset is perfectionism – the belief that everything we do must be outstanding at all times. The early stage of a project is not the time to worry about getting everything right. If you start in plenty of time, you'll be able to edit, rewrite, and double-check facts and citations. One way to crash through the wall of perfectionism is to start with an obvious error, which you will edit out later. Another approach is the letter-writing technique: for example, "Dear Mom, Today at work I'm supposed to be drafting a brief. Let me tell you about the facts of the case…."

4. **The "drive yourself crazy by doing nothing" approach.** Assemble all the materials for the project, arrange them in front of you on your desk, and then sit at your desk and do nothing for seven minutes (by the clock). Don't even write down any of the ideas that are sure to come to you during this period. By the end of the seven minutes, you'll be itching to start. Incidentally, the reason for *seven* minutes is to make sure that you do sit for seven actual minutes. "Five minutes" or "ten minutes" tend to become concepts rather than actual time periods.

5. **Work no more than fifteen minutes at a time.** This is my favorite anti-procrastination method. Set a timer – a wristwatch alarm is a discreet alternative – and decide to work full blast on a project for the next fifteen minutes. When the timer goes off, decide immediately whether to stop at that moment, or to reset the timer and work for another fifteen minutes. Most of the time, I've built up enough interest in a project after fifteen minutes that I don't want to stop when the timer buzzes. I've worked for hours using this method, yet it never feels that long because I know that a break is never more than fifteen minutes away.

6. **Start even if you're not in the mood.** Sigmund Freud once said, "When inspiration does not come to me, I go halfway to meet it." You don't have to be inspired to start on something. If you wait for inspiration, you run the risk that it might never come. It's more reliable to train yourself to start to work, then see if the ideas start to flow. Establish the daily habit of settling down

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to work during your usual high-energy periods, so that your muse knows when and where to find you, if it so desires.

7. **Realize that unpleasant tasks don't get any easier over time.** If anything, unpleasant tasks become more so when we put them off. Even worse, the worry over *not* working on a project takes at least as much energy as just getting on with the task. It's like swimming in the ocean when the water's cold: some people prefer to run quickly into the surf and deal with the shock in a few frigid seconds. Others stretch out the agony by stepping in inch by shivering inch. I've finally learned that it's easier to take deep breath, plunge in, and get the agony over with as soon as possible.

8. **Schedule a "catch-up" day.** Here's a way to attack all those annoying little tasks that are so easy to ignore. A friend of mine tells me that every month or so, she sets aside a day devoted entirely to those tasks. "Those days are tough," she admits, "but you can't imagine how terrific it feels to finally get all those things done."

9. **Honor your leisure time.** Paradoxical though it may sound, making sure you have a reasonable amount of time for rest, relaxation, and just plain fun is one of the best ways to deal with procrastination. It's all too easy to adopt the mindset that we will let ourselves play only after we have finished all our work. However, "work before play" is best applied in a daily or weekly context, not over the course of months or years. Forcing yourself to work all your waking hours for weeks on end – or feeling as if you should be keeping up that pace – leads to inefficiency, stress, depression, and burnout. You can be more productive over the long run if you treat your work life as a marathon rather than a sprint, and pace yourself accordingly. Knowing that you have only a limited amount of time to work, as well as having something fun to look forward to, will help you be more efficient during the time you have allotted to work. Remember how much you managed to get done on the day before your last vacation?

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Timesaving Telephone Techniques

by Margaret Spencer Dixon, Esq.

From a time management perspective, the telephone can be our best friend or our worst enemy. How can you make sure that the phone (and its attendant technology) remains your servant instead of becoming your master? Here are a variety of techniques to help you stay in control of your time.

Some General Techniques

- **Set up a foolproof system to handle incoming messages**. If you use voicemail, use a notebook or a section of your day planner to write down messages as you listen to them. Highlight follow-up tasks, and either do them immediately, or transfer them to your to-do list. If your office uses the "pink slip" system, make sure that everyone taking messages for you knows what information to get – name, affiliation, reason for the call, telephone number(s), and the best time to return the call – and precisely where to put the message slip. Check that location at regular intervals throughout the day as well as each time you return to the office. The best location is just outside your office door, so you won't be distracted by incoming slips yet can conveniently pick up your messages.

- **Develop your own written call-return policy.** One of the perennial complaints about lawyers is that they don't return calls. We're usually so busy that we tend to forget just how crucial this aspect of our profession is. One way to remind yourself of this is to write down your intended call-return policy, and then post it where you will see it frequently. Some sample policies are:

  - ***All calls returned within 24 hours.***
  - ***All calls returned the day they are received.***
  - ***All client calls returned within four hours; all others, within 24 hours.***

  Choose a policy that is consistent with the type of professional reputation you want to maintain.

Dealing with Incoming Calls

- **Reduce incoming calls by setting up a system for keeping your clients informed about their cases.** This system could include a schedule of regular reports – written, telephonic, or both, depending on the situation and personalities involved. Send the client copies of all documents. When you are proactive about keeping your clients informed, they won't need to call you as often.

- **Schedule regular "quiet time" to work on high-concentration tasks.** For no more than one or two hours a day, have your incoming calls screened by your secretary or voicemail. You can accomplish a lot in a relatively short time when you focus your attention entirely on one project.

- **When your secretary screens your calls, be sure to provide all the information needed to do the job.** This information includes the location where you are, the day or time you will be able to return calls, and the names of VIPs whose calls you will take if you are at all reachable. If your firm is large, don't assume your secretary knows who all the players are. A friend of mine once confided to me with horror the time his secretary said to him, as an afterthought, "Oh, by the way, a 'Mr. Knight' called earlier." She didn't know that 'Mr. Knight' (not his real name) was the firm's managing partner and most powerful rainmaker.

- **Decide in advance how much time to spend on routine, non-client calls.** Keep a timer by your phone and start it when you begin a call. Once the allotted time is up, conclude the call gracefully by saying something like, "Well, I'm sure you're busy, so I'll let you get back to work now." Observe your own conversational habits to make sure you're not the one saying, "Just one more thing…." Let the other person have the last word.

Dealing with Outgoing Calls

- **Plan your calls in writing.** List all the points you want to cover during the phone call. For people you speak with frequently, keep their names on pages in your day planner. As you think of things you want to

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tell someone, jot them down, and then discuss them all at once the next time you speak with that person, instead of picking up the phone each time something occurs to you.

- **Batch your calls.** Make all non-crucial calls one after the other during regular call-back periods. You'll have an incentive to keep calls as brief as possible when you know you have five or six to get though. Try scheduling your call-back periods at some point during the first two hours of the morning or the last two hours of the afternoon, when it's easier to reach most people. (From Robert Moskowitz, *How to Organize Your Work and Your Life* (Garden City, N.Y.: Doubleday, 1981).)

- **Make only necessary calls.** Use alternative methods of communication such as email or fax for transmitting routine, non-confidential information.

- **Minimize telephone tag.** Ask people you phone regularly the best time to reach them and record that information in your phone directly. Give others the same information about you. Make sure your outgoing voicemail greeting includes the best time to reach you and asks callers to leave the same information about themselves. Also, to prevent or end a rousing game of phone tag, arrange for a specific time to have the conversation. Volunteer to initiate the call, thus avoiding wasting precious minutes as you both sit by your phones, wondering which one of you is to place the call. For important calls, fax or email your agenda in advance.

Knowing the Value of Voice Mail

- **Learn how to use your office's voicemail system.** Most systems have many timesaving features, but we're often too busy to learn how to use them. Keep a diagram or "cheat-sheet" to remind you how to perform the various functions.

- **Send time-delayed reminders to yourself.** Most systems allow you to delay the delivery of voicemail messages for up to one year. Send messages to your own voice mailbox to give yourself an extra reminder of impending deadlines, meetings, and things to do.

- **Keep your outgoing voicemail message updated.** Whenever you will be away from the office for more than a day, record a new voicemail greeting such as, "This is Laura Lawyer on Tuesday, May 12. I'll be out of the office all day today (or, until X o'clock), but I'll be checking my messages frequently and will return your call as soon as possible." Be sure to leave yourself a time-delayed reminder to update your greeting once you return.

- **Take care of business entirely by voicemail whenever possible.** Most systems allow you to send voicemail messages directly to a voice mailbox without calling the person's extension. When dealing with colleagues on routine matters, make sure your message includes all the necessary details.

- **Delegate tasks by forwarding voicemail messages to your secretary's voice mailbox.** Most systems allow you to attach your own message to a forwarded message, so you can give specific directions about how to handle routine items or to transcribe long or important messages.

- **Use voicemail to send the same message to your entire work team.** Most systems allow you to set up mailing lists so that you can send one message to multiple mailboxes simultaneously. Have a mailing list set up for each of your work teams or projects so you can make announcements and update information efficiently.

- **When you're away from the office, leave messages for yourself.** If you are out of the office and think of something you need to do once you return, call your extension and leave a voicemail message for yourself. Or when you're at work, call your home answering machine to remind yourself of an early morning meeting the next day. Follow up the meeting reminder with a note on your bathroom mirror, and you'll have no excuse for forgetting that meeting.

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How to Create the Perfect Organizer

by Margaret Spencer Dixon, Esq.

Used appropriately, an organizer or planner can be a marvelous tool. Use inappropriately, however, it can be tedious and time-consuming, leading you to abandon it in frustration.

The basic concept underlying an organizer is simply to keep all the information needed to do your work and run your life arranged for quick and easy access. While your organizer should be as simple as possible, it should include at least a calendar, address and phone directly, and space for master to-do lists.

The most important thing to remember in figuring out how best to use your organizer is that it is only a means to make your life run more smoothly. The goal is to create a system that serves your particular needs and saves you time. So design your organizer to fit you, instead of adapting yourself to a particular pre-packaged system.

Make It Work for You

In that spirit, here are ten tips to help you get the most from your planner or organizer.

1. **Be creative.** Investigate the various types of organizers available, and mix and match sections. Check out the options at your local office supply store or in catalogs. Use only those sections you feel you really need, and use them in a way that makes sense for you. (Remember, there are no "organizer police"!)

2. **Be flexible.** As each new project or case arises, create a new section for it in your organizer, and keep your master to-do list for that project in that section. Phase out sections you no longer use. Instead of writing the name of each section on a tabbed notebook divider, use numbered dividers. That way you can simply update the table of contents as the sections in your notebook change. Continually streamline your system. As you gain experience in getting and staying organized, you will learn what works best for you.

3. **Make it convenient.** Choose an organizer that is large enough to hold all the information you want to record, yet is not so bulky that it's inconvenient to carry around. Usually this requires a variety of trade-offs, in terms of the size you choose, the amount of information recorded, and the extent to which you incorporate computerized elements. You can incorporate a smaller "satellite" notebook as part of your system, keeping the satellite with you to capture information and then using it to update your primary notebook.

4. **Keep it handy.** Designate one place on your desk to keep your organizer whenever you are at your desk. Learn to reach for the organizer automatically whenever you need to record information. Take it home with you as well as to meetings and on business trips.

5. **Keep your maintenance routine simple.** You probably don't need to perform a detailed planning session each day. Try preparing a detailed plan of action no more than once a week, then updating it each day to reflect tasks accomplished and changes in circumstances.

6. **Devote a section to your daily to-do list.** Ideally, your daily to-do list should include only those tasks you are seriously committed to accomplishing that day. Use your "master list" to keep track of all other upcoming to-do items. Strive for a realist daily to-do list. Focus on sticking to that list unless and until it becomes glaringly obvious that your time is better spent dealing with some late-breaking emergency.

7. **Keep one calendar for both business and personal commitments.** Choose a calendar that's large enough to record all your commitments even if you don't use tiny handwriting.

8. **Use technology.** A simple word processing program can be helpful in using your organizer efficiently. For example, create your master lists on the computer, print them out, insert them in your

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organizer, and update them by hand until individual pages are full or get too messy for comfort. Keep your directory of names, addresses, and phone numbers on your computer. There are a wide variety of inexpensive, simple, flexible, and comprehensive software programs that can print lists and labels in any format you design.

9. **Don't use technology as an aid to procrastination.** One touted benefit of most computerized organizers is that they automatically move any undone to-do items to tomorrow's list. The downside of this "benefit" is that it reduces your sense of urgency about a task, since you know it will reappear on your daily to-do list without any affirmative action on your part.

10. **Use your organizer to put more fun in your life.** Have a section for fun things to do, books to read, and movies to see. Keep a section entitled "Tasks Accomplished" so you can see what you've actually completed and so you'll be motivated to reward yourself when you deserve it.

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How to Delegate

by Margaret Spencer Dixon, Esq.

If you have trouble delegating work to others, you're in excellent company. As recorded in the 18th chapter of Exodus, the same problem plagued Moses. Moses insisted on judging every dispute arising among his people until his father-in-law, Jethro, convinced him to manage his time more effectively by training others to judge the simple cases, leaving Moses free to focus on the difficult ones.

As Moses must have discovered, effective delegation is a valuable investment of time and energy. While it takes time initially to identify people willing and able to do the job and to train them to do it well, there's ultimately a point at which the time invested in delegating becomes less than the time it would have taken to do the task yourself. Besides freeing up your time for other important tasks, thoughtful delegation makes the fullest use of your organization's personnel, promotes your employees' professional development, and makes your organization a more satisfying place to work.

Here are ten tips to help you become a more effective delegator:

1. **Decide which tasks to delegate.** Triage your to-do list. Eliminate tasks of marginal value, retain tasks that only you can do, and consider delegating everything else, including tasks that you, currently, can do faster or better than your employees. Ask your employees which tasks they think can be abbreviated or eliminated and which they are interested in taking on. Don't keep a project for yourself just because you enjoy doing it. If *you* find a task challenging, rewarding, or just plain fun, chances are your employees will too.

2. **Plan.** Take the time to think a project through carefully before you delegate it. Clarifying your own thoughts first allows you to communicate them clearly to others.

3. **Clearly communicate the project's objectives and parameters.** Minimize the risk inherent in delegating by providing adequate information and training up-front and making sure your delegatee understands your expectations. Otherwise, you risk frequent interruptions for clarification, or, worse, a result that is not at all what you had in mind.

4. **Delegate sufficient authority.** Delegating responsibility for a project without granting the requisite decision-making authority is unfair. Give the delegatee enough authority to complete the project at the level you expect without needing continuing input from you.

5. **Avoid micromanaging.** There's more than one way to accomplish almost everything, so give delegatees latitude to use their own creativity and methods within the parameters you have communicated. One of the goals of delegation is to develop your employees by requiring them to expand their decision-making and problem-solving skills, and this can be accomplished only when you allow them the freedom to do so. Express your confidence in delegatees' judgment and ability to complete projects successfully. Intervene only if you sincerely believe that the ultimate success of a project is at risk.

6. **Negotiate deadlines.** Don't insist on a specific due date unless the matter is truly urgent. Whenever possible, have the delegatee commit to a due date of his or her own choosing. Tell the delegatee that you must be informed of any proposed revisions to the due date as soon as possible, and certainly in advance of – not on or after – the due date itself. Consider scheduling frequent informal oral progress reports to ensure that the project stays on track.

7. **Be organized.** Develop and use a simple form to keep track of delegated tasks. Include a brief description of the project, the delegatee, the date on which you delegated the project, the scheduled follow-up date(s), the due date, the actual completion date, and your comments regarding the quality of the result. In addition, record the follow-up dates on your calendar or tickler sys-

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tem, ideally in the presence of the delegatee. Saying "Let me just make a note on my calendar" is an effective way of ensuring that both you and the delegatee will remember your agreement.

8. **Leave room for mistakes.** Allow for the honest errors that invariably occur during the course of any creative or innovative endeavor. Weigh the costs of such errors against the benefits of letting employees learn from their mistakes. Focus on solving any resulting problems rather than on chastising the person who made the mistake. Ask the employee for suggestions about how to reduce the risk of having the mistake recur. Create an environment that encourages employees to bring mistakes and problems out in the open in enough time to correct or solve them.

9. **Train employees to solve problems.** Be available for guidance and assistance in brainstorming, but steer delegatees towards resolving minor problems on their own. For major problems, request that the delegatee analyze the situation and provide recommendations regarding the best way to resolve it.

10. **Give feedback.** Give feedback promptly, praising the positive aspects of the project and providing constructive criticism on areas that could stand improvement.

In short, delegate to your employees the way you'd like your boss to delegate to you.

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Ten Tips for Using Technology Efficiently Without Letting It Run Your Life

by Margaret Spencer Dixon, Esq.

The appropriate use of technology has the potential to significantly enhance our productivity and save time and energy. The inappropriate use of technology, however, has the potential to significantly diminish productivity, engender frustration, and squander precious time and energy.

Three major challenges arise in the course of determining the appropriate use of a particular technology:

- First, optimal technology use is highly personal; a computer program or electronic gadget may appear logical and intuitive to one person but oddly designed and cumbersome to another.

- Second, we must usually use the technology for a while before having enough information to decide whether a system is right for us.

- Third, in order to get the most benefit from technology, we must use it judiciously.

Here are ten points to consider in choosing the technology that will be most helpful to you, and using it in the most productive manner:

1. **Make technology decisions in light of your personal needs and preferences.** No one should feel obligated to keep up with others technologically if their current system satisfies their needs. Judge a system by its results, not the level of technology used to achieve those results. For example, I know a well-organized partner at a Silicon Valley law firm who manages his complex legal practice using little more than a calendar and a dime-store notebook. I also know many less-organized individuals who find little benefit in even the most up-to-date, multi-function information management programs.

2. **Before adopting a new technology, carefully consider the likely time and energy costs** of learning it and integrating it into your overall system. All new technology requires some time investment up-front. Consider the slope of this learning curve and whether the likely improvements to the bottom line will justify this start-up time. Take the time to research which programs and systems are both easy to learn and designed with a robust tolerance for human error.

3. **When adopting a new technology, allow sufficient time with it – at least several weeks – before you decide whether it is right for you.** Expect to make mistakes when you learn a new program, and view the trial-and-error learning process as the norm, not as evidence of poor technological skills. Re-scan the user's guide after using the program or gadget for a while; what made little sense at first will be much clearer once you have a framework of knowledge to work within.

4. **Multitask with caution.** Doing more than one thing at a time is not necessarily good time management. "Humans subjected to excessive laboratory-induced multitasking show increased tension, diminished perceived control, and even experience physical discomfort."[1] Assess whether the benefits of compressing activities justifies the increased stress.

5. **Set your own boundaries.** Consciously choose when and how you are willing to be available to others. Use technology to enforce those limits: let your answering machine or voicemail screen your calls during pre-determined periods; turn off your e-mail prompt and check for new messages every hour or so, rather than allowing new

[1] Michelle M. Weil and Larry D. Rosen, *Technostress: Coping with Technology @ Work @ Home@ Play* (New York: John Wiley & Sons, 1997) at 109.

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e-mail to interrupt or distract you whenever it arrives.

6. **Set your own pace.** Just because you are able to respond to an e-mail instantaneously does not mean you always should. Some responses require time to formulate – to research, discuss with others, or think through your answer. You might want to let the sender know that you received her message, and that you are working on an answer which you expect to transmit to her within, say, 24 hours. Educate your clients and correspondents regarding a reasonable turn-around time.

7. **Apply the basic principles of paper management to all incoming pieces of information** regardless of their source**.** For example, whenever you check your e-mail, voicemail, incoming pages, etc., deal with the item as few times as possible. Complete minor tasks immediately without even transferring them to a to-do list, or do as much as you can on the task upon first receiving it (forward a message, fill out a form, etc.) If you cannot complete an item the first time you hear, read, or touch it, add the task to your master to-do list so can complete it at a more appropriate time.

8. **Consolidate your work by merging the output of different forms of technology.** For example, instead of using your e-mail in-box, saved voicemail messages, and the stack of faxes as *de facto* separate to-do lists based on the method by which the task was first communicated to you, keep one comprehensive, backed-up master to-do list on a PIM (personal information manager) such as Microsoft Outlook, or even on a simple word-processing program such as Microsoft Word. Other systems include transcribing voicemail upon first listening to it; printing out substantive e-mails to put in paper files; or scanning paper documents into a word-processing program for inclusion in electronic files.

9. **Don't reinvent the wheel when it comes to filing.** The names and organization of your electronic files and physical files should parallel one another as closely as possible.

10. **Decide when enough technology is enough.** Occasionally doing things the old-fashioned way – such as writing a thank-you note by hand – is a pleasurable change in a high-tech world.

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Tips for Using Microsoft Outlook To Manage Your "To-Do" Lists

by
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1. When using the Task feature to maintain your various "to-do" lists:

   a. Use the "category" option to allow you to organize your tasks in various useful views.[1] To categorize a task, input new tasks using the complete new Task box (visible when you double-click on the line that reads "Click here to add new Task" or when you select "File" => "New" => "Task" from the menu bar). In the new Task box (which will bear the heading "Untitled – Task"), click on the "Categories" button to bring up the "Categories" box. In the "Categories" box, click on the category in which you want your task to appear, then click "OK." When you are finished inputting the new task, click on "Save and Close" in the Task box.

   b. If you want to use a category that doesn't already exist in Outlook's Master Category List, click on the "Master Category List" button (visible in the "Categories" box which appears after you click the "Categories" button in the new Task box) and add any new categories. If you're going to be using a Palm™, keep the number of categories to fifteen or fewer, since that's the maximum number of categories permitted in Palm's To-Do application.[2]

   c. Begin each task with the name of the project or client/matter, so that all the tasks on a given project or client/matter will appear together when you view your tasks sorted alphabetically by subject.

   d. To sort tasks alphabetically by subject (in any view in the Task function), click on the Subject bar at the top of the list. This organizes the tasks into either normal alphabetical order (if the triangle in the Subject bar is pointing up) or reverse alphabetical order (if the triangle in the Subject bar is pointing down). To reverse the direction of the triangle, click again on the shaded Subject bar.

   e. To sort tasks chronologically by due date (in any view in the Task function), click on the Due Date bar at the top of the list. This organizes the tasks into either normal chronological order (if the triangle in the Due Date bar is pointing up) or reverse chronological order (if the triangle in the Subject bar is pointing down). To reverse the direction of the triangle, click again on the shaded Subject bar.

---

[1] The specific directions contained in these tips will work verbatim in Microsoft® Outlook® 2000 (in Windows 98); the configuration of the commands and buttons may differ on other versions of Outlook.
[2] This limitation applies to Palm Applications v. 3.5, which is the version available on Palm Vx as of December 2000. To determine what version your Palm contains, tap the silkscreen "Home" button, then tap the time display => "Options" => "About Applications."

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2. When all your tasks are categorized, use the “By Category” view as your Master To-Do list. On the menu bar, select “View” => “Current View” => “By Category.” The names of the categories will appear in shaded bars. Double-clicking on a shaded bar toggles between showing and hiding the list of tasks in that category. So to view only one category at a time, double-click on all other categories so that only the shaded bars are visible. When viewing tasks within a particular category, click on the Subject bar to view that category’s task alphabetically; click on the Due Date bar to view that category’s task by due date.

3. When all your tasks are categorized, create a weekly “to-do” list as follows:

   a) From the menu bar, select “View” => “Current View” => “Define Views” to bring up a box titled “Define Views for ‘Tasks’.”

   b) In the “Define Views for ‘Tasks’” box, click on the “New” button to bring up a box titled “Create a New View.”

   c) In the “Create a New View” box, insert a name for the new view, such as “Tasks for the Week.” For “Type of view,” select “Table.” Click OK. The “View Summary” box now appears.

   d) In the “View Summary” box, click on the “Fields” button and choose the fields you want to include in the new view. Include at least the fields for Subject, % Complete, Due Date, and Categories. Click “OK” in the “Show Fields” box. (Do not click on the “OK” button in the “View Summary” box.)

   e) Back in the “View Summary” box, click on the “Filter” button to bring up the “Filter” box.

   f) In the “Filter” box, click on the “More Choices” tab, then click on the “Categories” button, and click on the categories you want to appear in the view. Click on “OK” in the “Category” box. (Do not click on the “OK” button of the “Filter” box.)

   g) Still in the “Filter” box, click on the “Advanced” tab, then click on the “Field” button and select “Frequently Used Fields” => “Due Date.” Under the word “Condition,” select “in the next 7 days.” Click on the “Add to List” button. (Do not click on the “OK” button of the “Filter” box.)

   h) Still in the “Advanced” tab of the “Filter” box, click on the “Field” button again and select “Frequently Used Fields” => “% Complete.” Under the word “Condition,” select “not equal to.” Under the word “Value,” insert “100.” (This prevents tasks that are 100% complete from appearing in your new view.) Click on the “Add to List” button. (Do not click on the “OK” button of the Filter box.).

   i) Still in the “Advanced” tab of the “Filter” box, click on the “Field” button again, and again select “Frequently Used Fields” => “Due Date.” Under “Condition,” select “on

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or before." Under "Value," insert "today." (This means that overdue items will appear in your list.) Click on the "Add to List" button.

j) Now click "OK" in the "Filter" box.

k) Click "OK" in the "View Summary" box.

l) Click "Apply View" in the "Define Views for 'Tasks'" box.

Your new view will now appear when you select "View" => "Current View" => "[name of your new view]."

4. Create today's to-do list by following the same steps as for creating a weekly to-do list, except skip step (g).

5. Within the view you've created for your daily to-do list (or your weekly list, for that matter), you can rearrange the order of the items (to put them in the order in which you plan to do them) by using the "% Complete" field as a proxy for priority. For each task, insert any number from 0 and 99, then sort by that field by clicking on the shaded "% Complete" bar at the top of the table.

6. Extra tip: always insert a due date for a task, even if it's just an approximate one. One handy technique: for tasks that are to be done on some non-specific day during a given week, choose one consistent day of the week to serve as the "holding tank" for your weekly list. For example, if you choose Friday to serve this purpose, part of your weekly planning would involve reviewing all the tasks assigned to that day, and reassigning each tasks to other days of that week based on priority and "critical path" attributes. So whenever you insert a new task, its due date will be the Friday immediately preceding the week you plan to accomplish the task.

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Tips for Using Project-Specific Word To-Do Lists Within the Outlook Task Function

by Margaret Spencer Dixon, Esq.
(January 22, 2007)

Introduction

During most of my time management seminars, I demonstrate various ways to use the Task function in Microsoft Outlook to manage to-do lists. (See "Tips for Using Outlook for Your To Do Lists," which is also available for download at www.TimeManagementForLawyers.com). This paper describes how (and why) to use project-specific to-do lists in Microsoft Word in addition to – and in conjunction with – the Outlook Task function.

The Basic System

- For every significant case, matter, or project, create a new Word document specifically to serve as the to-do list for that case, matter, or project, and save it in the electronic file for that case, matter, or project. A case, matter, or project (and from this point on I'll say simply "project") might be considered significant for this purpose if it involves, say, on the order of at least ten or twelve individual tasks.

    - Tip: I like to name this project-specific Word to-do list according to a standard format such as:

        .To Do (ClientName-MatterName), which becomes:

        .To Do (Jones-Negotiation XYZ parcel)

    - Tip: Beginning the document name with a punctuation mark such as a period (or the @ sign if the period is difficult to see) means that the document will appear at the top of the document list within the electronic folder, since the automatic alphanumeric sort system on Windows computers sorts first by punctuation, then by numbers, and then by letters.

- Brainstorm all the possible tasks that may need to be done in connection with the project. [Just putting them on your list doesn't mean you commit to doing (or delegating) the task, it's just a way of keeping the task in mind so that you can decide whether the task should eventually be done at some point.] This project-specific Word to-do list is also a logical, convenient place to jot down reminders, notes, and ideas that you want to keep in mind in connection with this project.

- Create an Outlook Task that will serve as one of your primary gateways to your project-specific Word to-do list. The task description for this Outlook Task should encompass the entire project, e.g.: "Smith v. Jones Settlement Negotiations" or "XYZ Corp. Acquisition." This Outlook Task should remain in your Outlook throughout the duration of the project. In the notes field for that Task (accessible when you double-click on the Task), insert a hyperlink to the project-specific Word to-do list. To do this:

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(1) click anywhere within the notes field of the Outlook Task;

(2) select Insert / File;

(3) navigate to and highlight [single-click only] the document name of the project-specific Word to-do list;

(4) click on the arrow to the right of the Insert button which is at the bottom right of the "Insert File" window"; and

(5) select "Insert as Shortcut" (in later versions of Outlook, the option is named "Insert as Hyperlink").

Your project-specific Word to-do list is now incorporated within your Outlook Tasks, and is only a few clicks away for ease of frequent review and revision.

- Tip: Choose one day a week (say, Friday) to serve as the day on which you will have your Weekly Planning Session, and assign that upcoming Friday as the due date for this Outlook Task. (This just means that this Outlook Task will appear in your "Tasks for Today" view on that day,[1] which will remind you to review the project-specific Word to-do list.) Once you've reviewed the project-specific Word to-do list, reassign the due date for the following Friday.

- Review all of your project-specific Word to-do lists at least once a week (optimally during your Weekly Planning Session). The week before it is time to actually do one or more of the tasks in a particular project-specific Word to-do list, just copy (don't cut) the text describing that task from the project-specific Word to-do list, create a new Outlook Task, and paste the text describing that task into the subject line of the new Outlook Task. Your project-specific Word to-do list should remain unchanged. The reason you want to create a new Outlook Task for the one particular task is so that the task will be visible on your Outlook Task list for the particular day on which you want to do the task, rather than buried several layers down on the project-specific Word to-do list.

  - Tip: I like to include a prefix in the Outlook Task's subject line to indicate the project to which the task belongs, e.g.:

    Smith v. Jones: Contact Fred Jones re negotiation strategy

  - Tip: You might also want to insert a link between this Outlook Task and the Outlook Contact entry for Fred Jones. To do this, click on the "Contacts" button that's at the bottom left of the Outlook Task. Scroll to Fred's entry (or just click anywhere within the list of contacts and start typing his last name), then double-click on his name. His underlined name in the field next to the Contacts button is now a hyperlink to his Outlook Contact entry.

[1] See "Tips for Using Outlook for Your To Do Lists" for a detailed description of how to set up different Views (such as a "Tasks for Today" view) within your Outlook Tasks.

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- Tip: You might also want to link this Outlook Task to the Word document containing your notes about your ideas regarding the negotiation strategy. Do this in the same way you inserted a hyperlink to the project-specific Word to-do list, as described above.

- When a task has been completed, indicate this in two ways: (1) delete the task-specific Outlook Task (but do not delete the general project Outlook Task, which should remain unchanged throughout the course of the project); and (2) in some manner, indicate on your project-specific Word to-do list that the task has been completed. For example:

  Smith v. Jones: Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07

  I like to use colors and other font variations in order to further differentiate between completed tasks and tasks that are not yet done. For example:

  Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07
  Contact Sue Brooks re status of research – INSERT
  Decide whether to travel to CA for negotiation or to use telecon – INSERT

  ("Insert" here is simply a placeholder on which to double-click for ease of inserting text such as "DONE on Fri 1/19/07".)

  Here's another variation using Format / Font / Strikethrough:

  ~~Contact Fred Jones re negotiation strategy~~ – DONE on Fri 1/19/07
  Contact Sue Brooks re status of research – INSERT
  Decide whether to travel to CA for negotiation or to use telecon – INSERT

  And another:

  Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07
  Contact Sue Brooks re status of research – INSERT
  Decide whether to travel to CA for negotiation or to use telecon – INSERT

  The variations are endless; experiment to find the formats that work best for you.

A Few Extra Bells and Whistles

- If you want to make your project-specific Word to-do lists a treasure trove of valuable information, whenever a task is completed, you might want to note such information as: how long it took to complete the task; who did the task (if you delegated it to someone else); your thoughts about the delegatee's work, and any other information that would otherwise be forgotten. Keep copies of your completed project-specific Word to-do lists together in an electronic folder for ease of future reference. Possessing the information in these completed to-do lists – and having this information readily available – are the primary benefits of using project-specific Word to-do lists in conjunction with Outlook Tasks.

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- Build up a stable of project-specific Word to-do list templates for standard projects, so instead of creating each project's to-do list from scratch, begin by (1) selecting the template that is most applicable to the new project, (2) saving that template as a new document, and (3) customizing that pre-existing to-do list contained in that template. (Tip: It's much simpler to keep these templates just as regular Word documents, rather than as "templates" as Microsoft Word uses that term.)

- Use ActiveWords (see "Windows Quick Keys & Other Keyboard Timesavers" available at www.TimeManagementForLawyers.com) so that you don't have to type out the date each time you insert, say, "DONE on Fri 1/19/07." Actually, I find it helpful to create two special ActiveWords each day when I'm updating my to-do lists: <do> to my mind stands for "done on" and I use that code as an ActiveWord for the entire phrase, "Done on Fri 1/19/07." I also use <db> as an ActiveWord; it stands for "done by" and I use that code as an ActiveWord for the entire phrase, "Done by Fri 1/19/07." (I like to indicate at least roughly when a task has been done, and sometimes I don't get around to updating my to-do lists until my Weekly Planning Session, and all I recall then is that the item has been completed at some point within the past week since my last Weekly Planning Session.)

- Use ActiveWords as another gateway to access your project-specific Word to-do lists. I like to assign the abbreviation <tdl> (for "to do lists") as an ActiveWord to open each and every one of my project-specific Word to-do lists. (Yes, you can assign the same ActiveWord to open multiple documents.) Typing <tdl> then pressing the F8 key (which activates ActiveWords) will then reveal a list of all of your project-specific Word to-do lists; just click on the one you want in order to open it. In this way, you can quickly access any one of your project-specific Word to-do lists without having to navigate to the project's electronic file, or using the Outlook Task hyperlink.

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Windows Quick Keys & Other Keyboard Timesavers

by Margaret Spencer Dixon, Esq.
(January 5, 2007)

Key(s)	Effect
Double-click	Highlights word
Triple-click	Highlights paragraph
Control + A	Highlights all text in document
Control + C	Copies all highlighted text onto clipboard
Control + V	Pastes all text from clipboard
Control + X	Cuts highlighted text and copies cut text onto clipboard
Control + Z	Undoes last edit
Control + Y	Undoes what "Control + Z" just did (i.e., reinserts previous edit)
Delete	Cuts highlighted text without copying it onto clipboard
Windows icon + M	Minimizes all windows
F2	Selects file name or folder name when file or folder is highlighted. If you then press Control + C, this copies the name of the file or folder onto the clipboard, from where it can be pasted (using Control + V) as any other text. This is a handy way to reference a filename accurately without having to retype it.
F5	Inserts current time and date (in Notepad, which is in "Accessories")
PrintScrn	Copies the current screen onto clipboard. To get a hard copy of your screenshot: open an image program such as Paint (in "Accessories"), press Control + V to paste the screenshot into the Paint document; print.

Hint: Many of the above quick keys (including the Control + A, C, V, X, and Y keys) work in Outlook as well, which is especially handy in the Task function if you want to reassign the same future due date to multiple tasks. Just copy (Control + A + C) the new due date once, then click in the due date field for the next task, press Control key, and hold it down while pressing the A and then the V keys. Further hint: If you are looking at your Tasks for Today view, the task will disappear from the view once you insert the future due date, and the curser will automatically end up hovering above the date field for the next task. Therefore, if you want to insert the same future due date for the next task(s) in your list, all you have to do for all subsequent tasks is: left-click to insert the curser in the next task's date field, then press the Control + A + V keys again; you don't even have change your finger positions on the keyboard. (To do this, I usually use my left thumb to click the curser, then my pinky to press and hold the Control key, my ring finger to press the A key, and my pointer to press the V key; after several repetitions these motions become almost one fluid flick of the wrist.) Note: Double-clicking

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and triple-clicking in a List view in Outlook does not copy the text, but opens the window of the task you're clicking on. At that point, double- and triple-clicking works as described in the table above.

Another hint: All of these Control + letter quick keys (and more) are listed opposite the applicable function in the "Edit" menu of Word, Outlook, and other standard Windows programs.

Yet another hint: Check out the wonderful program www.ActiveWords.com which lets you quickly and easily assign words or codes to replace text, open files, open folders, and more in any program on a computer on which ActiveWords is installed. (The Control + A, C, V, etc. keys work in ActiveWords as well, so you can copy and paste existing text into ActiveWords, so you need never again type anything more than once.) You can also assign the same ActiveWord to open multiple files or folders; e.g., "pending" can be assigned to all the documents you want to access quickly, without having to navigate through your various folders and subfolders; "ToDoLists" (or "tdl") can be assigned to open your detailed Word to-do lists for your various projects. The possible ways to use ActiveWords to increase your efficiency are endless.

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APPENDIX D

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Please note: The instructions for each of these exercises are merely guidelines. I strongly encourage you to refine, revise and/or disregard any instructions or suggestions that you feel are not appropriate for you.

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Exercise #1 - Brainstorming Goal Ideas

Before you begin this exercise, consider this: Dr. Gerald Bell, Professor of Organizational Behavior and Management at the University of North Carolina at Chapel Hill, surveyed 4000 retired executives. Dr. Bell asked the executives, who averaged 70 years of age, "If you could live your life over, what would you do differently?" Their most frequent responses were:

1. I would have carved out life goals and owned my life.
2. I would have taken better care of my health.
3. I would have managed my money a lot better.
4. I would have worked on my family a lot more.
5. I would have spent more time on personal development.
6. I would have had a lot more fun in my life.
7. I would have planned my career.
8. I would have lived at oneness with God and/or given more back to my community.

To brainstorm goal ideas, think of things that you want to <u>have</u> (material goals), <u>do</u> (experience goals), or <u>be</u> (character goals) at some point in your life. Consider categories such as:

- Career
- Community
- Family/Friends
- Finances
- Health/Fitness
- Intellectual/Cultural
- Recreation/Hobbies
- Spiritual

as well as any other categories that make sense for you.

Now, as quickly as you can, write down at least fifty different goal possibilities for yourself. Don't edit yourself at this point; just let the ideas flow. Including an idea on this list does not mean you are committing yourself to that idea as a goal; this is simply the first step in the process. You can always evaluate and refine your ideas later on.

						*
1.	_____	1	3	5	10	___
2.	_____	1	3	5	10	___
3.	_____	1	3	5	10	___
4.	_____	1	3	5	10	___
5.	_____	1	3	5	10	___
6.	_____	1	3	5	10	___
7.	_____	1	3	5	10	___
8.	_____	1	3	5	10	___
9.	_____	1	3	5	10	___
10.	_____	1	3	5	10	___
11.	_____	1	3	5	10	___
12.	_____	1	3	5	10	___
13.	_____	1	3	5	10	___
14.	_____	1	3	5	10	___
15.	_____	1	3	5	10	___
16.	_____	1	3	5	10	___
17.	_____	1	3	5	10	___
18.	_____	1	3	5	10	___
19.	_____	1	3	5	10	___
20.	_____	1	3	5	10	___
21.	_____	1	3	5	10	___
22.	_____	1	3	5	10	___
23.	_____	1	3	5	10	___
24.	_____	1	3	5	10	___
25.	_____	1	3	5	10	___
26.	_____	1	3	5	10	___
27.	_____	1	3	5	10	___

						*
28.	_____	1	3	5	10	___
29.	_____	1	3	5	10	___
30.	_____	1	3	5	10	___
31.	_____	1	3	5	10	___
32.	_____	1	3	5	10	___
33.	_____	1	3	5	10	___
34.	_____	1	3	5	10	___
35.	_____	1	3	5	10	___
36.	_____	1	3	5	10	___
37.	_____	1	3	5	10	___
38.	_____	1	3	5	10	___
39.	_____	1	3	5	10	___
40.	_____	1	3	5	10	___
41.	_____	1	3	5	10	___
42.	_____	1	3	5	10	___
43.	_____	1	3	5	10	___
44.	_____	1	3	5	10	___
45.	_____	1	3	5	10	___
46.	_____	1	3	5	10	___
47.	_____	1	3	5	10	___
48.	_____	1	3	5	10	___
49.	_____	1	3	5	10	___
50.	_____	1	3	5	10	___

Whatever you can do, or dream you can, begin it.
Boldness has genius, power and magic in it.

-- Goethe

Exercise #2 - Prioritizing Goal Ideas

For each goal idea listed in the preceding exericse:

(a) Circle 1, 3, 5, or 10 to indicate roughly how many years it would take to achieve.

(b) Put a star next to the goals that are most important to you.

(c) Choose up to four important (starred) one-year goals, and rewrite them below.

(d) Rank them from most important (A) to least important (D).

(e) Repeat steps (c) and (d) for three-year, five-year and ten-year goals.

One-year goals

Goal	Rank

Three-year goals

Goal	Rank

Five-year goals

Goal	Rank

Ten (or more)-year goals

Goal	Rank

Exercise #3 - Creating Your To-Do List Pyramid

(1) Creating your *Master Planning List* In the middle column of the *Master Planning List*, write down, as quickly as you can, a list of everything you "must" do -- and everything you think you might want to do -- in every area of your life. Just get all these items out of your head and down on paper without thinking too much about any one item. If there's a specific deadline for a particular task, include that too. Use abbreviations freely.

(2) When you cannot think of any more items to include in the middle column, go back through your list and, in the left column, write down the name of the case, project, category (such as marketing, professional development, administrative, etc.) or area of your life (such as household, personal, fun, etc.) to which each item belongs. Don't think too much about what to name any particular category; just go with whatever pops into your head first.

(3) Creating your *Weekly To-Do Plan* When you have categorized all the items in your *Master Planning List*, go back through the list again, and identify no more than twenty items you want to focus on in the coming week. If you have more than twenty items you want to accomplish in the coming week, pick the twenty most important items. (You can always go back and add more items to your weekly list after you have completed the twenty most important tasks.) Each time you identify an item for inclusion in your weekly plan, place a check-mark in the "Include in Weekly Plan" column. (Better yet, instead of using check-marks, write "1" for the first task you identify, "2" for the second task, etc., so that it will be immediately apparent when you reach the twenty item limit.) Write these items in the *Weekly To-Do Plan*. (Try to insert the items in your weekly list so that items in the same categories appear together.)

(4) Creating your *Daily To-Do Plan* Once you have completed your *Weekly To-Do Plan*, go back over it and identify no more than four items you want to focus on tomorrow. If you have more than four items you want to accomplish tomorrow, pick the four most important items. (You can always go back and add more items to your daily list after you have completed the four most important tasks.) Write these items in the *Daily To-Do List* in the order of their importance.

(5) Tip: If you have your *Master Planning List* transcribed into a word-processing program such as Microsoft Word, simply insert the items in the order in which they appear in the master planning list, including the name of the category before each item. Use the automatic "sort" function (in Word, click on Table, then Sort) to alphabetize the entire list, and all the items in each category will then appear together.

Master Planning List

Category	Task	Include on Weekly Plan

(If you need more space for your *Master Planning List*, use the back of these pages.)

Weekly To-Do Plan

Category	Task (not in order of importance)	Include on Daily List
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
	10	
	11	
	12	
	13	
	14	
	15	
	16	
	17	
	18	
	19	
	20	

Daily To-Do Plan

Category	Task (in order of importance)	Done
	1	
	2	
	3	
	4	

(If you need more space for your weekly or daily to-do plans, go back and read the directions.)

Exercise #4: Project Files

Start your own Project File system by writing descriptions for three of your current projects.

____-2010-01 _____
initials

_____

_____

_____

_____

____-2010-02 _____
initials

_____

_____

_____

_____

____-2010-03 _____
initials

_____

_____

_____

_____

Exercise #5 - Dealing with Worry

Pick a situation or problem which is currently worrying you, and answer the following questions in writing:

(1) What precisely am I worried about?_____

_____

_____

_____

(2) What are the underlying causes (not the symptoms) of this problem?

_____

_____

_____

_____

(3) If the worrisome situation has not yet occurred, how likely is it to occur in the future? _____

_____

(4) What, if anything, can I do to prevent this situation from occurring?

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

(5) When can I start implementing the plan described in the answer to question 4?

_____

_____

Exercise #6 - Weekly Blueprint

Create a blueprint for your "ideal" workweek in order to determine for yourself, in a visual format, an appropriate balance among work, play, family time, household tasks, community activities, exercise, etc. How would such a week look for you?

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
6:00							
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							
10:00							
11:00							

Exercise #7 - Dealing with Procrastination

Identify a project or task you've been procrastinating on recently: _____

_____

STEP ONE: "I choose to . . . Describe the benefits of performing this project or task:

_____

_____

_____

Describe the consequences of not performing this project or task: _____

_____

_____

_____

Which do you prefer (choose one): a. Consequences of not performing task
b. Benefits of performing task

If you have chosen (a), cross the project off your "to do" list and proceed to step five.

If you have chosen (b), continue with step two.

STEP TWO: " . . . start . . . "

Identify the next time you can spend at least fifteen minutes working on this project:

_____

STEP THREE: " . . . on one small task . . . " Describe a small, relatively easy aspect of this project that you can get a good start on in fifteen minutes or less:_____

_____

_____

STEP FOUR: " . . . humanly . . . " What is the worst that can realistically happen if you make a mistake in the performance of the small task you described in step three?

_____

_____

_____

STEP FIVE: " . . . while making time for rest, fun, and relaxation."

Turn to (or create) your master list for "fun." When is the next time you can "work" on an item on that list? Schedule that time on your calendar -- not as a reward for any particular accomplishment, but just because you deserve a reasonable amount of "R&R" in order to maintain your mental and emotional balance. Be sure to honor that commitment to yourself.

Exercise #8 - Time Management Techniques to Try

Review the seminar handout, and identify the time management techniques that you believe could make a significant difference in your work life. Estimate how easy or hard it would be for you to develop the habit of using the technique on a regular basis.

Time Management Technique	Page	Ease of Use
1. _____	____	Easy Medium Hard Unclear
2. _____	____	Easy Medium Hard Unclear
3. _____	____	Easy Medium Hard Unclear
4. _____	____	Easy Medium Hard Unclear
5. _____	____	Easy Medium Hard Unclear
6. _____	____	Easy Medium Hard Unclear
7. _____	____	Easy Medium Hard Unclear
8. _____	____	Easy Medium Hard Unclear
9. _____	____	Easy Medium Hard Unclear
10. _____	____	Easy Medium Hard Unclear
11. _____	____	Easy Medium Hard Unclear
12. _____	____	Easy Medium Hard Unclear
13. _____	____	Easy Medium Hard Unclear
14. _____	____	Easy Medium Hard Unclear
15. _____	____	Easy Medium Hard Unclear
16. _____	____	Easy Medium Hard Unclear
17. _____	____	Easy Medium Hard Unclear
18. _____	____	Easy Medium Hard Unclear
19. _____	____	Easy Medium Hard Unclear
20. _____	____	Easy Medium Hard Unclear

Identify the three techniques which you believe will be easiest for you to develop as habits, and brainstorm things you could do to remind yourself to use the techniques on a regular (ideally daily) basis:

Your top three techniques	Ideas for Implementation
1. See #___ above.	_____
	_____
	_____
	_____
	_____
	_____
2. See #___ above.	_____
	_____
	_____
	_____
	_____
	_____
3. See #___ above.	_____
	_____
	_____
	_____
	_____
	_____

Make a note on your calendar to remind yourself to experiment with one new technique every month, progressing from the easiest techniques to the hardest.

Use your calendar to help you install your new habits; for example, put a check mark (or a gold star) on each day you used the technique. If you use a technique, say, ten times the first month, shoot for using it twelve or fourteen times the following month. Expect setbacks, and persist in aiming for slow, steady improvement over the long run.

APPENDIX E

Suggestions for Further Reading

Allen, David Getting Things Done. New York: Penguin Books, 2001. An excellent description of the key methods for managing workflow, from processing information contained in paper, e-mail, and voicemail to developing an effective system of "next action" lists.

Covey, Stephen R. First Things First. New York: Simon and Schuster, 1994. An elaboration on the time management concepts introduced in The Seven Habits of Highly Effective People.

Fiore, Neil. The Now Habit: A Strategic Program for Overcoming Procrastination and Enjoying Guilt-Free Play. Los Angeles: Jeremy P. Tarcher, Inc., 1989. The best book I've seen on procrastination: practical, useful and realistic.

Linenberger, Michael. Total Workday Control Using Microsoft Outlook: The Eight Best Practices of Task and E-Mail Management. San Ramon, California: New Academy Publishers, 2006. Helpful ideas for using Outlook to manage your tasks and your e-mail.

Loehr, James E. Stress for Success. New York: Random House, Inc., 1997. Written by a sports psychologist, this atypical stress management book recommends that "corporate athletes" forget about trying to reduce the stress in their lives, and instead explains how to apply standard training principles (such as alternating cycles of exertion and recovery) in order to increase their capacity to handle stress.

Available from the American Bar Association (telephone 800-285-2221; www.abanet.org):

- "So Little Time, So Much Paper," by Margaret Spencer Dixon, A Three-Tape Audio Program to Help You Organize Your Time and Manage Your Paperwork. Audio program (2 hours and 45 minutes) and soft-bound book. Product Code V00SLTC.

- "So Many Meetings, So Little Time: Making Meetings Shorter, Better Organized, and More Productive," by Margaret Spencer Dixon. Audio program (66 minutes) and soft-bound book. Product Code V05SMMC.

- "The Lawyer's Guide to Palm® Powered Handhelds," by Margaret Spencer Dixon. Book (260 pages). Product Code 5110505.

  (Please note: www.TimeManagementForLawyers.com has links directly to the ABA store's online pages for these items.)

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- **Article #1.The Essential Skill of Time Management.pdf** (78K)
- **Article #2.Time Management Habits - How to Develop Good Ones.pdf** (86K)
- **Article #3.Yes, You Can Learn To Keep Your Desk Clutter-Free.pdf** (31K)
- **Article #4.Overcoming Procrastination.pdf** (22K)
- **Article #5.Timesaving Telephone Techniques.pdf** (149K)
- **Article #6.How to Create the Perfect Organizer.pdf** (22K)
- **Article #7.How to Delegate.pdf** (22K)
- **Article #8.Ten Tips for Using Technology Efficiently.pdf** (79K)
- **Basic Time Log.doc** (58K)
  Untimed version. This document is in Word format so that you can customize it to suit your needs.
- **Timekeeping grid.doc** (49K)
  Six-minute increment version. This document is in Word format so that you can customize it to suit your needs.
- **Tips for Using Outlook for your To Do Lists.pdf** (26K)
- **Tips for Using Word To-Do Lists With Outlook Tasks.pdf** (43K)
- **Weekly Planning Grid.doc** (59K)
  This document is in Word format so you can customize it to suit your needs.
- **Windows Quick Keys & Other Keyboard Timesavers.pdf** (23K)

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Evaluation

1. On a scale of 1 to 5, how useful did you find the ideas presented in today's program?

   {not useful} 1 2 3 4 5 {very useful}

2. On a scale of 1 to 5, how do you rate the overall quality and effectiveness of today's program?

   {low quality/effectiveness} 1 2 3 4 5 {high quality/effectiveness}

3. Would you recommend this program to others? Yes No

4. What did you like most about this presentation? _____

_____

_____

_____

5. What did you like least about this presentation? _____

_____

_____

_____

6. Which ideas presented in this seminar do you plan to use?

_____

_____

_____

7. Any other comments? _____

_____

_____

_____

Name:_____ (optional) ABA.100428

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