



## **7<sup>th</sup> Annual Solo and Small Firm CONFERENCE AND EXPO**

# Managing Information Overload & Having a Life: A Primer

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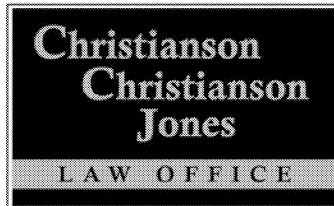
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# Managing Information Overload & Having a Life:

## A Primer

By Bjorn (Barney) Christianson



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*Email management • Wellness and balance • Work life balance*  
*Tips, tools and techniques for better time management*

Why talk about 4 these issues all at once? Because you must - they do not exist in isolation from one another.

You work for a living, right? Think about those words – You **work** for a **living**. Nothing else puts bread on the table, bonnets on the bairns, and the Porsche beside the porch. Work will not kill you... but worrying about work will. You have to **plan** your work if you want to take the worry out of it.

How well could you work from the hospital? You certainly cannot drive the Porsche from that bed. The bairns may have their bonnets now but it would be real nice to see them wearing their mortarboards on Graduation Day. You must work but you need to be physically and mentally healthy all of your life, not just after the “first warning” heart attack. Unless you won the genetic lottery, you have to **plan** to make wellness and balance part of your life.

The luckiest people I know love their work. It **is** their life. But even they take a break. The best of them take several breaks a day and real holidays each year. Most of us, however, are not always in love with our daily bread generator; we can benefit from more “life” in the work/life scales. That will not happen if you do not **plan** to create the balance you need.

Time Management as a topic is older than dirt. You can quote Publius Syrus from 43 B.C. on it. I have. Google “Time Management” and you will get 1,490,000,000 hits. Lawyers in particular seem fascinated or bewildered by it, probably because we are often in thinking in .1 units of an hour. Millions of articles, books, tips, tools, techniques (see our Ad!) - many of which can punch your particular button, but there is only one foundation for good time management. You have to **plan** for it.

Finally – Email. The Fifth Horseman. The Destroyer of all good days... unless it, too, is managed.

Everything – work, time, life, or wellness – happens best with a **plan**.

## HOW TO PLAN

First of all, consider these basic principles involved in setting and implementing a successful plan.

### 1. EXPAND YOUR TIME HORIZONS

If you are driving down the road looking only at the rear bumper of the car in front of you, you will not have time to react when the traffic light up ahead turns orange or someone cuts in front of the traffic in front you. You must look ahead.

You have to think about what is coming up in the longer term that would be easier to handle if you got a head start. You have a Discovery scheduled in 4 months. Before

then, you will want to chase the opposing counsel for his documents, prepare your questions, review the documents and pleadings and meet with your client. So, with 16 weeks to go, what you might be putting on your list for today is: Prepare a Pleadings Binder.

It will not take more than 2 or 3 minutes to flip the calendar ahead and note the icebergs on the horizon.

## **2. USE YOUR BEST TIME OF DAY**

Most of us cannot run at peak efficiency for 5 or 6 hours a day, let alone the 12 or so that many of us spend at the office. You ***must*** use that portion of the day when you are at your best and brightest as efficiently as possible. If you are a morning person, get in at 7 or 7:30 and go for it. If you a night owl, don't come in until 9 or even later but stay late. And during that Best Time, put the throttle down. Don't make appointments for that time or check your Facebook page. Do not do your photocopying or filing or other task that you can do when your brain has effectively given up for the day.

I used to think this step was just part of the day-to-day planning process, not worthy of mention at this point. Experience has taught me that it is so critical that it must inform your entire approach to the whole process. Simply never waste your Best Time of the day.

## **3. DO HARD THINGS FIRST**

Sometimes more bluntly stated as it Eat the Cockroach first. When you have a list of things to do, it is human nature to do the easy ones first. You feel like a hero when you get to stroke a bunch of them off your list and you can pretend you accomplished a lot. But you are really just avoiding the hard thing. Your will power always diminishes as the day goes on – leave it too late and you will not be able to force yourself to look at the cockroach, let alone eat it.

After doing the hardest task, the rest will look easier; it's a built-in reward system.

You will also find that the task is probably not as hard as you thought; it just looked hard because you wanted to put it off. If you do put it off, it is self-reinforcing ugly. You have started a death spiral.

## PRIORITIES: WHAT THEY ARE AND HOW TO ESTABLISH THEM

### 1. HERE IS *THE PROBLEM*:

Each second, minute, hour and day is an irreplaceable chunk of a finite lifetime. Not one second of it can be replaced. Today we all have opportunities to do many more things than we could ever accomplish in 10 lifetimes, let alone one. You must face up to this reality - not only can you not do it all, you cannot even come close to doing everything you *want* to do. You will be lucky and well-organized if you can do everything you *must* do and a reasonable chunk of what you would *like* to do.

### 2. THE FIRST ANSWER TO *THE PROBLEM*:      **Learn to say No.**

The 2 hardest things to teach a lawyer are to ask for money and say No. But get over it or get out - you have to do both of them.

There are different ways to say no.

**“No”**, is fun. If you find it is too dramatic to simply say No, you might say instead “I have made commitments to existing clients and I must keep them. Therefore I cannot take on a commitment to you; if I did I would just disappoint them and you. So, thanks very much for thinking of me but, No.”

**“Not NOW”**. When you say yes to something, you are often saying yes to 2 things - I will

do it **and** I will do it now. Many times people are either unaware of what you will have to do to accomplish the task or perhaps simply asking when they say “Can I get this tomorrow?” Ask them if you can get back to them in two weeks to discuss it.

**Delegate.** Get someone else to do it. That someone else might be your own assistant:

- need a pile of documents sorted and numbered?
- need to make some calls to see if a certain report can be located?
- need to get a client in for a meeting?

What did you learn in law school that made you better equipped than your assistant to complete such tasks?

Estate tax returns, inventories for Probate applications, family law accountings – are you the best one to do those or should you be delegating to an accountant or a bookkeeper?

**Dodge.** Suggest someone else. “No, I cannot speak to the UCW this Thursday afternoon but I know this young lawyer/accountant/insurance salesman who might be able to help you.” Be thoughtful about it and you might even get a return referral.

### **3. THE SECOND ANSWER TO *THE PROBLEM*:      Set priorities.**

Having thought ahead and avoided everything you can, the next step is to prepare a recorded, i.e. not mental, To Do List. Record every task that is yours to accomplish. Next you must set the priorities for those tasks.

#### **Different Meanings of Priorities**

A thing's priority is never a stand-alone fact. Priority is always determined on a relative basis. ***This*** is more important or more urgent than ***that*** and therefore must be given a higher priority. It is not just the task's nature that gives it the higher priority; it's the factors surrounding the task. For example, preparing a will for a client does not appear to have the same priority as doing the transfer documents on a million dollar deal with a

closing on the 20th of next month. But if you add the factor that the client is leaving for Afghanistan in the morning, the priorities change.

For the moment you are faced with certain factors and you must decide the priorities for the **present** moment.

### **Important v. Urgent**

Think about the difference between Important and Urgent. Something may be quite urgent but of trivial value. Something else may be of considerable importance yet not immediately urgent. However, if you put off the important task and deal with the urgent one, you may not get to the important one before it becomes both important and urgent all too suddenly.

For example, your client has to exercise an option to purchase at the end of next month, and you would like to get a draft out to your client to proof before you deliver it to the owner. Lots of time, but if you miss the deadline, your client's loss is measured in the hundreds of thousands of dollars. On the other hand, Joe Angry has delivered a box of papers and he is screaming at you to sue his former business partner RFN – today yet. However, this is about a dispute that started 6 months ago and you have 5.5 years left on the limitation clock. Do the draft of the option first. One is important; one is said to be urgent but it lacks importance at this moment.

### **Assigning the Priorities**

There are no absolutes in this game. If it is not immediately obvious what difference in priority exists between 2 items then, for your purposes, they are of the same priority.

All your tasks should be divided into blocks so that one block of tasks will have a higher priority than another. You don't want a list of 50 items with a descending order of priority. You want 3 or 4 blocks or groups of items, with the items in each block being of roughly equal priority.

For example, cut the list into the 4 categories:

- I. Important and Urgent
- II. Important
- III. Urgent
- IV. Sometime

- I. **Important and Urgent.** Emphasis on the ***and***. When you first start out, or when you have let things slide for a while, this may seem like the biggest group but be careful that you have really distinguished between what is Important ***and*** Urgent and what is merely Urgent. To get in this first group, it has to be both. Take heart, it will not be long before you get to the point where this is the smallest group - 3 to 5 items out of your 50, at the max.
- II. **Important.** This should be self-evident. Checking Facebook is not important, drafting an affidavit for a Motion to be heard next week is. Just remember that this comes before urgent.
- III. **Urgent.** You already know how many so-called urgent demands you encounter in a day. The folks who said they were urgent probably did not know all of the factors you would have to consider before you assigned a priority to such tasks. They certainly did not know what other tasks you had already assumed responsibility for. It is your job to determine what is Important and what might be both Important and Urgent.
- IV. **Sometime.** I eventually came to call it Maybe Never. I put things on this list, to remind myself that I said I would like to do it someday; for example, read a particular article or book. If it is on there so long that I cannot remember why I marked it down, I trash it. Some web browsers have a Read Later function to mark Webpages you think you want to read but not right now – use that and you soon see how many pages you thought would be interesting lose their appeal in a day or two.



## Following Priorities

You now have your plan. Stick to it. Start with the top category, first item – the cockroach in that category - and stay with it until it is done. Tidal waves, nuclear war, postal strikes - no matter what the interruption, stay with this item until it is done, then go to the next one.

## REVISE REVISE REVISE

You determined your priorities based on the current factors in the present moment. That moment will pass. Some of the factors will change. New tasks will have arisen and you have noted them down so you could put them on your To Do list **after** you have assigned the appropriate priority. The obvious consequence is that you must review and revise your list – no more frequently than once a day, and probably every day.

For example, just before you quit for the day, put everything **but** your list away. Take a deep breath. You are done, so let your mind relax. Then look at the list, the entries that were there when the day began and those that have been added on the side as the day went on. Set your priorities for tomorrow, and go home. As you leave, repeat the words that Winston Churchill said to Clementine each night after he was safely tucked into bed: To hell with them all.

Next morning, take a fast look at the list to see if your medication was affecting your judgement last night. Don't quibble with yourself over minor changes. Unless you think you made a real mistake, just get on with the first thing in your first category.

## THE DO NOTs:

There are many negative ways of saying Set Priorities and Stick to Them, such as:

DO NOT DO THE EASY WORK FIRST (eat the cockroach)

DO NOT FIGHT FIRES (urgent is the third category, not the first)

DO NOT PUT OFF BIG TASKS (break the task into smaller parts and deal with them one at a time)

DO NOT SAY "YES" (say No, defer or refer)

DO NOT DO WHAT OTHERS CAN DO (delegate)

DO NOT BE DEFEATED BY MENTAL BLOCK (get advice)

There is no competition, however, for the Number One DO NOT:

**DO NOT GET DISTRACTED.**

And, bar none, the number one distraction these days is usually email.

Whether you call them distractions or interruptions, these are deadly for many reasons:

- They break your chain of thought. You may lose a good idea forever.
- They waste time disproportionately. A study from the University of California at Irvine found that office workers took an **average** of **25 minutes** to recover from such interruptions as phone calls or emails and return to their original task. The brain will rewind to the start of that original task, not simply take off in full flight from the point of the interruption like a PVR after you hit Pause then Play.
- They disrupt your order - you were working on an Important and Urgent matter and now you are listening to a Maybe Never.

You can avoid many interruptions by blocking out your Best Time to work, shutting the door, turning off the phone, working somewhere where they cannot find you (the Court House library, for instance) and so forth. But you have to tame the email beast.

## A PLAN TO MANAGE EMAIL

**Put a process in place in place to sort and manage your Inbox.** If you just open the basement door and chuck everything down the stairs, the basement will soon be full of things you don't want or, worse yet, want but cannot find. You know better than to let that happen at home; don't let it happen to your Inbox. Clean out your Inbox every day so it does not become a randomized file cabinet. Try this instead:

- Set up four folders or categories such as *Do*, *Defer*, *Delegate*, *Delete*.
- Once a day, open your Inbox and sort through the messages, fast.
- (Depending on your mail program) CTRL-left click every message you think you can reply to in 2 minutes and move them to *Do*.
- If you cannot put it in *Do*, *Delegate* or *Delete*, put it in *Defer*. When you next revise your To Do list, assign a priority and put it on the List.
- If you don't have someone to *Delegate* to, name this folder *File* – its one of the most time-consuming tasks related to email management and you can do it late in the day when you have given up brain-powered work.
- Yes, you could *Delete* them as you see them but if you move them all here together, you can delete them in a block later. You have also given yourself a second chance if you were hasty.

**Stop Reacting Immediately.** If Canada Post delivered your letters one at a time throughout the day, you would know better than to drop everything and deal with each letter as it came in. So why do that, just because its email? Set your program to check for mail every 3 hours, for instance. You are not obligated to be available 7/24 and if it's really an emergency, you will hear about it somehow.

At the very least, turn the “ding” off. One every 5 minutes is 12 interruptions an hour, 96 interruptions in an 8 hour day, 480 interruptions a week, 1,920 interruptions a month,

23,040 interruptions a year.

**Don't use multiple e-mail addresses.** Each address duplicates your administration and management time. One for work should be all you need.

**Keep your domain email strictly for business.** Do not use it to subscribe to lists, newsletters, etc. Each new email adds to your grief and cuts into your productive time. For family emails and subscriptions etc., get a Gmail account and check it when you are done working for a living that day.

## PLAN YOUR SCHEDULE – WORK, WELLNESS, BALANCE, LIFE

### A. Plan your month/year

Repeat this: Expand your time horizon. Only some parts of this can be carved in stone – those parts that deal with your family, your health, your holidays. Are there family occasions coming up that you want to be part of? Anniversaries, graduations, birthdays? Your annual physical? Put them in the calendar and do not accept commitments that will prevent you from attending.

When are you going to take a two- or three-week holiday? Put it in the calendar and block out 3 days before to tie up loose ends and 3 days after to get your brain back in gear and up to speed on your files.

By the way, the first task to do upon return to the office from a holiday is to book the next one.

Canadians benefit from a long weekend in virtually every month of the year. Pick 4 of them and make them 4 days long by taking the day before or after.

Not every holiday need to be a voyage on the Queen Mary 2. A 4-day junket to Vegas = cheap flights and hotels. Take a bag full of non-law books, read all day, and go watch the crowds at night.

If you are old enough to remember what a pool hall is, find a table and see if you can get the skill back. Build a deck in the back yard or put a brick wall around it. Yes, a pro can do it better but the goal is to take your mind off work, not “maximize your return on investment.”

Do this plan first and review it monthly.

## **B. Plan your day/week**

Repeat these: Expand Your Time Horizons and Use Your Best Time of Day. You are going to protect your Best Time to work on your To Do List, beginning with the hardest task in the Important and Urgent category. But if you are going to be away later this week, you might need some extra time to see people and make some calls. Adjust accordingly.

Be careful not to over-book. As a lawyer in a solo or small firm situation, there is much you have to do in the office that does not involve clients. Of course, s\*\*\* happens too. Leave some time in your day to take care of it.

Include your wellness and balance factors. Work hard for 45 minutes then take a 10 minute break. Enforce it with a timer. Don't eat lunch at the desk – go for a walk. Slot a 5 minute break to call your spouse, mother, child, friend and say Hey, how are you.

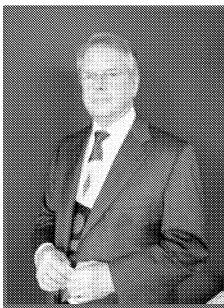
Do this plan on Friday, for the following week, and revise it daily in conjunction with your To Do list.

## CONCLUSION:

**“The days are long enough for those who use them.”**

**Leonard da Vinci**

**He managed to get some stuff done. You can too.**



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# Managing Time and Information Overload In a Busy Practice

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This paper was adapted from a paper titled “Managing the Email/Communication Juggernaut” written by Dan Pinnington and Peter Roberts (Practice Management Advisor for the Washington State Bar Association) for the 2011 Pacific Legal Technology Conference.



## Setting the Stage

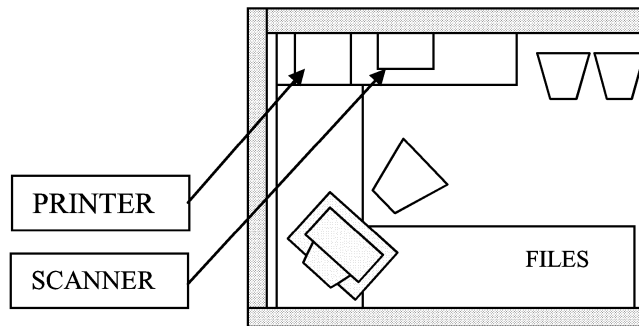
A law office is a busy place. You are too busy. Email and other communication must proceed from a base of order. Order means three things:

1. Time management
2. Everything in its place
3. Follow procedures

Time management means carefully spending your time in the most productive and comfortable way. We are human, so procrastination is okay—but set limits! Remember that you must know two things: what active matters are in your office and the status of each matter. Knowing these two facts, you can better use your time wisely.

Everything in its place means that your office is orderly. You should have lots of surface area for projects and easy access to the printer, scanner, fax, files, office supplies, etc. Minimize the need to leave your chair.

Procedures are the anchors that ensure a consistent way of handling routine tasks. Consistency reduces error. For example, there are decisions required for just the mail:



- ✓ Sorted?
- ✓ Opened by the same person?
- ✓ Date stamped? Where?
- ✓ Copies made? For whom? Trial notebook? Working file?
- ✓ Scan to a PDF certain types of documents?
- ✓ File original in a staging file?

A well-run office will have consistent procedural answers. These answers are documented for all of the administrative tasks encountered each day: email, faxes, master documents, physical file, electronic folder hierarchy, file naming, telephone conversation notes, general notes, etc.

With such foundational notions in place, you are ready to embrace ideas, tools, and concepts that enhance your effectiveness. Keep an open mind and choose those ideas that fit best with who you are—but be open to change! Remember that you may have to try an idea before you can adequately decide if the idea will work. Expect surprises because your brain may not always agree with your mind! Habits are a two-edged sword!

## Setting Goals and Learning to Delegate

Begin with the End in Mind<sup>1</sup> which is: imposing order and using time wisely.

The SMART way to set goals:

Specific \* Measurable \* Attainable \* Relevant \* Time-Bound

Look at your To Do list and divide it into five lists

- ✓ Important and Urgent
- ✓ Important but not Urgent
- ✓ Urgent but not Important
- ✓ Busy Work and
- ✓ Wasted Time

Do the Urgent and Important Tasks first with intervals for breaks. THEN do the Important but Not Urgent unless absolutely necessary. IGNORE the stuff on the other lists – these tasks are other people controlling your time. Impose control to your time usage.

How do you decide what is important? Pausing between projects to check Cnn.com or your stock portfolio is okay, but limit how much time that you spend. Recognize when you exceed reasonable boundaries. Avoiding all procrastination is difficult. Why are you delaying action on important matters? Unpleasant? Daunting? Wanting someone else to do it? If so,

- ✓ Unpleasant – promise yourself a reward and do a subtask no matter how trivial
- ✓ Daunting – break it into tiny pieces
- ✓ If you can delegate – do so!

Turn off email notifications, and any other time bandits. The apparently urgent, such as ringing phones and unanswered email, are not always important. Divide and conquer – set aside your best time in the day to do work. Ask people to send email and discourage voicemail. Change your voicemail message to state when you will return calls. Work in a war room when necessary for privacy. Learn to say “NO”.

## Using Tools and Ideas

- Use two computer monitors. You can be much more efficient if you use two computer monitors. The monitor straight in front of you is your working monitor. You do the bulk of your work on it, including drafting documents, and likely,

<sup>1</sup> With a nod to Stephen Covey.

reading and replying to emails. The second monitor is your reading monitor. Place it to the left or right of your working monitor, depending on your personal preference. It should be oriented in portrait position (the longer edge on the side) so it is aligned to the shape of a piece of paper. On a wide screen monitor in portrait orientation you can read an 8x14 inch document at almost full size. With two monitors, copying and pasting text becomes much easier. You will find yourself printing fewer documents with the ability to read a document on one screen and work on another.

- Use Quick Parts in Word and Outlook (if you have Office 2007 or 2010) for repeated text to speed up routine written communication.
- And do not forget those helpful keyboard shortcuts:
  - ✓ Ctrl+N = new E-Mail message
  - ✓ Ctrl+Enter = to send an email message (But be careful with this one – always check the To, CC and BCC lines to make sure you are sending the message to the correct people.)
  - ✓ Ctrl+T = new Task
  - ✓ F7 to spell check
  - ✓ Ctrl+B = open Address Book

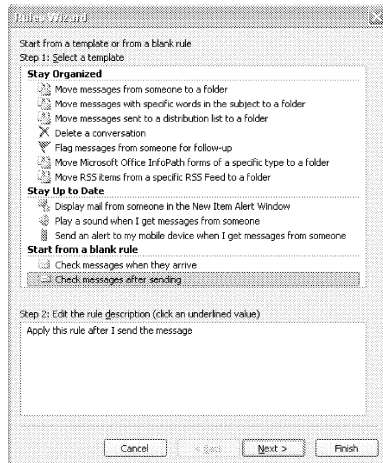
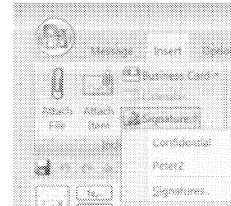
(If you are not familiar with the syntax for describing keyboard shortcuts, simply remember that a plus sign (+) between two keys means that you press the listed keys, almost simultaneously, moving from left to right. For example, a capital B would be described as Shift+B.)

- Set and state your policy clearly to clients with respect to how quickly voice mail messages will be returned (e.g. “I return calls within 24 hours”, “...by end of the next business day”, etc.). Set a time that fits you, your practice and clientele – and make it very clearly known to your clients at the time of being retained so you can set and control expectations.
- When you leave a message on someone else's voice mail, make the most of it by:
  - Leaving a detailed message giving the information you want to pass on, or asking the questions you need answered;
  - Stating the date and time of your call; and
  - Indicating if there are specific times when you will be available for a return call.

Doing all these things will help the person understand why you called and, depending on the circumstances, will enable him to get back to you with the information you require, even if he must leave a detailed message on


your voice mail. If used properly, voice mail can eliminate the time wasted by telephone tag.

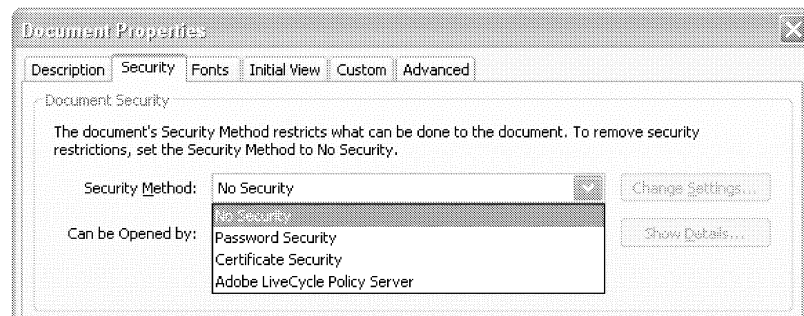
- In email you can use signatures to insert other text and info. E.g., "office directions" or text and map graphic. Simply click Insert, then Signature



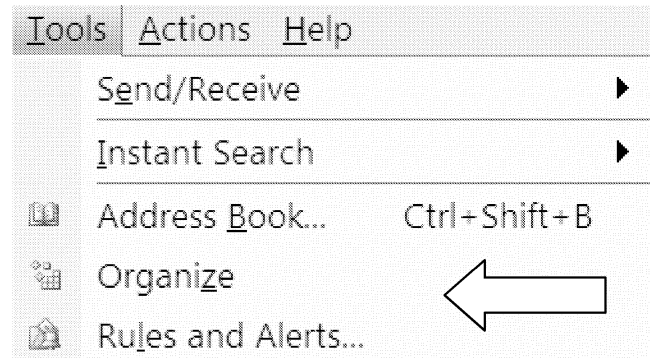
- Use a web fax service such as eFax or jFax.
- Use a rule to delay the sending of email. You may forget an attachment or the addressees are incorrect.

- **Copy2Contact:** This Outlook utility formerly, known as Anagram, lets you highlight contact info in any program and with one click, turn it into a contact entry in Outlook – truly amazing!
- **Outlook Contacts activity report:** If you use Outlook Contacts to maintain your clients, contacts, vendors, colleagues, etc try this: Open the details of a contact and click on the “Activities” button at the top. This will run a search across Outlook and pull up all emails, calendar events, tasks, and anything else associated with this contact in Outlook. Wow – almost as good as practice management software.
- **Make Outlook look like Gmail:** Do you like Gmail because it threads conversations (i.e., puts all emails related to a topic into one item that can then be expanded and contracted)? MS Outlook provides a similar way to view email. In Outlook 2007 click on “View” and select “Conversation” (the default is “Date”). This will group emails by subject and you can open each discussion by clicking on the arrows to expand the list. This custom view is specific to the folder, and is especially effective for folders you may use to keep discussion lists and other conversation based email. It is easy to get out of this view by clicking on any of the other field options (to, subject, sent, etc.) in the column headings at the top of the email folder.

- Use passwords to secure attachments. In Adobe Acrobat go to Properties > Security. In Word go to  and choose Prepare > Encrypt.



- Email can be saved in email folders or in Word folders. Use a rule to route email automatically to a client's folder. This feature is particularly useful for listserve traffic.



- Consider using a web portal such as DropBox, NetDocuments or PBWorks to house documents that the client can access. This may reduce the need of the client to email or call you for a document or learn the status of the matter.

## General Tips

Here are some general tips will help you move around and work with items more quickly within Outlook:

- Use plain English dates: Outlook understands plain English entries in date fields, and will enter the next occurrence of the described date. For example: typing "tomorrow" will enter tomorrow's date, "nov 4" will enter the next occurrence of this date, "one week" will enter the date one week from today, and "2 days" will enter a date two days from the current date.
- Drag and drop items of one type to create another – and save time. For example, dragging an e-mail message to the taskbar Calendar icon will open a new

appointment. Information from the original item will automatically be transferred to the new item so you do not have to retype it.

- Use a “right click” for format and configuration settings. In Outlook many options or features available with a simple right mouse click, including formatting and configuration settings. These options and features are “context sensitive” – in other words, you will be presented with a list of choices that are relevant to the item, field or text you are right clicking on. For example, right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar. You can right click on almost everything on the screen - try it!
- Sort items to quickly find the information you want. In all views you can sort items listed in a column with a click on column title bars. You can do this in your Inbox and the File Open dialog box. Clicking a column heading a second time will reverse the order. This sort feature works the same on column style information in all Microsoft Office applications, and in many other programs as well.
- Get organized with folders: Create folders to organize and separate items of the same type – for example, e-mail folders for individual clients with whom you exchange e-mails frequently, a generic folder for others, or archive folders for various e-mail lists to which you subscribe. For quick access to your most frequently used folders, create a link to them on the shortcut bar. To do this drag a folder from the Folder list and drop it on the shortcut bar. Select View, then Folder List to see your folders. You can use different folders as your “files”, rather than printing all items and storing them in separate physical client files.
- Create a message to give yourself a reminder: Through the course of the day you may come across tasks so that you want to complete at a later point in time. To give yourself a reminder of that task, open a new e-mail message and type and descriptive blurb in the subject line. Whenever you come back to your e-mail program you will get a reminder of the task. If that task remains undone at the end of the day, save the message in your Drafts folder so you have a reminder tomorrow.
- Keeping your sent folder empty: Many of the e-mail messages you send, indeed likely the majority of them, will be about minor things or things that are not related to any particular client file and therefore are not worth keeping. Going through your sent folder to delete those messages is a time-consuming task. By including a unique sequence of characters in the messages you have no desire to keep for the long-term, you can easily go into your sent folder, search for those messages and then delete them. I manually add “dfsi” to the end of my unimportant messages. It stands for “delete from sent immediately”. Every so often I go into my sent folder and then delete all the messages that contain dfsi. I

sometimes replace the “i” with a single digit number, for example dfs3, which indicates to me I want to delete a message in three months time.

- Create temporary holding folders: Leaving messages in your inbox will clutter it up and increase the odds you will miss an important message. Consider creating various subfolders off your inbox to temporarily hold messages. Give them various descriptive names and so it is obvious what type of message will be held in each respective folder. For example: hold, to be read, call backs, etc. You may even want to introduce a time element to some of your holding folders by using the names of upcoming days of the week.
- Change the display order of your folders: Your Outlook folders will appear in alphabetical order. By placing a space or ~ as the first character in the name of a folder, you will force that folder to be displayed at the top of a folder list. Multiple full tourists with a ~ at the start of the name will be displayed in alphabetical order by the second letter in the folder name.
- Work remotely: If you are using a laptop, you can configure Outlook to keep a full duplicate copy of all your data on its hard drive. This will allow you to work outside the office, reviewing e-mails, setting dates etc. Any additions or changes you make while at court or elsewhere will be updated in the main database when you next synchronize. You can also set Outlook up to allow you to send or receive e-mail remotely.
- Leverage the power of Outlook with a smartphone: For those who don't want or need a laptop, taking all your key contact and calendar information on the road with you is easy with a smartphone. Most smartphones can be configured to transfer email, contact and calendar information back and forth between a smartphone and Outlook.

## Tips for using the Outlook Calendar

- Use Calendar Views: Using the Calendar in day/week/month view shows you both your calendar and a task list on one screen. In this view you can edit or change either Tasks or appointments.
- At the beginning of each day, print out your calendar in Daily Style. This gives you a one-page hard copy of that day's appointments and tasks, and a handy central place to make miscellaneous notes as the day progresses. Review it at the end of the day to make sure you complete all necessary tasks.
- To see the entire day without scrolling, make the default appointment length 1 hour (right click on the time column, and pick 60 minutes).

- Share your Calendar with your assistant so he/she can add or edit appointments in it. This will eliminate the need to keep and synchronize a traditional paper-based date book.
- Tracking limitation periods: To keep track of limitation periods in Outlook, create events on the set dates and set alarms on those events that warn you – via a popup window – of upcoming limitation period deadlines days, weeks or months ahead. You can also run a separate card system as a backup.
- To gain some extra space on your desktop, make the Outlook Shortcuts bar narrower once you learn what the various buttons are. To do this, drag and drop the double-headed arrow when over right side border of the of Short Cuts bar. Leave just left part of the button labels visible so you can see enough of the label to differentiate similar types of folders.
- To gain even more space, turn the Folders list off. To view it again, click on Folders toolbar button.

## Tips for using the Outlook Tasks

- For things that repeat, create recurring appointments, events, or tasks. Do this at the time you create the item. Click on the Recurrence button to access the dialog box that has the parameters for setting the timing of recurring items. Note that you can edit individual instances of recurring items if you need to.
- Managing matters by taking tasks to Task: You can use Outlook Tasks to help manage your files and make sure you complete all necessary tasks by required deadlines. Keeping in mind that only today's and overdue Tasks appear by default in Calendar view, you can do the following to systematically track your client matters:
  - Create one main task for every matter, and indicate in point form in the subject area what is to be done, what you are waiting for, what dates are coming up etc. You can also create other separate Tasks for other matter related tasks or deadlines.
  - Start the subject in all work related Tasks with a ">", followed by the client name in capitals. This makes individual client matters easy to spot. Create personal items without the ">", and they will appear at the bottom of the task list.
  - In Calendar set your Tasks to be sorted alphabetically by subject (right click on the column heading, and chose this sort type).
  - As you complete the current work on any particular matter, edit its subject to add a description of what is to be done next, and enter a due date on the appropriate future date when the next step on the matter must be done. Doing this will make you trip over each matter at the appropriate time. As



well, a quick review of the subject of any Task lets you know the exact status of every client matter.

- Set alarms on Tasks when you want to be reminded of a limitation period or other important deadline. These alarms will pop-up reminder windows on the time and/or date specified.

## Tips for using the Outlook Notes

- Virtual sticky notes: The Outlook Notes folder contains individual “Notes” items, which are the electronic equivalent of a paper scratch pad or sticky notes. You can add text to these Notes by any of the conventional means. Use them to jot down questions, ideas or for any text or information that you may want to access in the future.

## Make Outlook work the way you do

- To get the most out of Outlook, you have to tweak features and change settings to match your own needs and preferences. To make some changes to Outlook’s configuration, select the Tools menu bar item, then Options. The Options dialog box contains dozens of configuration settings that may make Outlook work better for you.

## Learning More

- Training is key to get the most out of any program. Outlook is a complex program, and the interface is not terribly intuitive at times. To get the most out of Outlook, you must spend some time formally educating the people who will be using it. If you like self-paced learning, check Keystone Learning Systems ([www.keystonelearning.com](http://www.keystonelearning.com)). A set of Basic, Intermediate and Advanced tapes or CD's for Outlook 2000 costs \$160. Lynda.com offers very reasonably priced online courses on Outlook and other software programs.
- The Lawyer's Guide to Microsoft® Outlook 2010 by Ben M. Schorr. Published by ABA Law Practice Management Section. This great book is written specifically for lawyers to help them use Outlook to be more productive, efficient and successful. 240 pages | Paperback (There is also a version of this book for Outlook 2007).

