Tame the Inbox Monster:

Email Tools & AI to Take Back Control

with
Jeffrey Schoenberger
jeff@lawyerist.com

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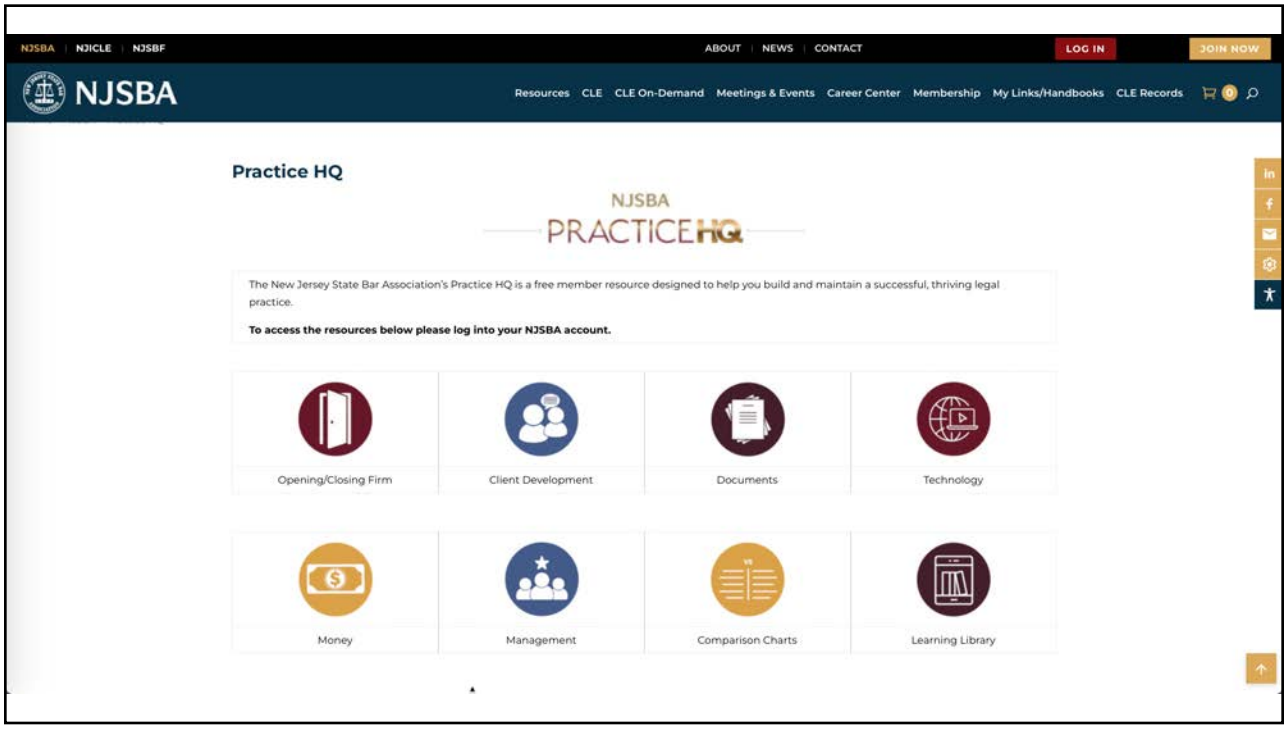

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On average, a person checks email 70+ times per day.

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Agenda

- Email and AI
- Outlook Classic
- Email Organization
- Email Add-ons
- Tips & Tricks
- Outlook's New Interface

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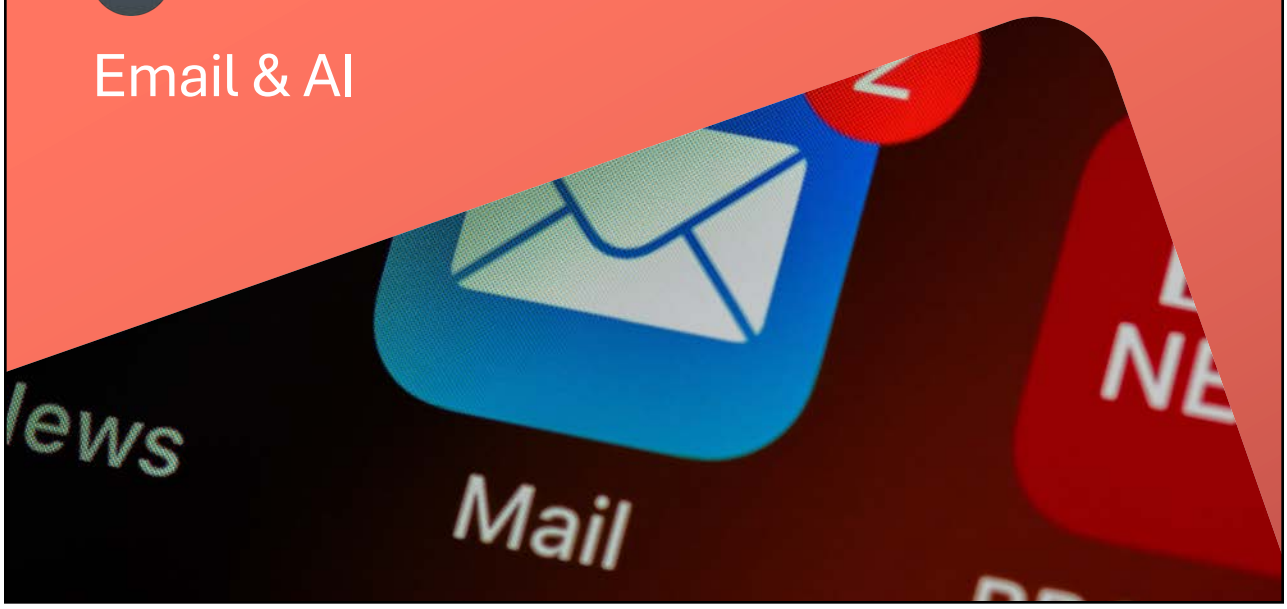
Email & AI



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AI is autocomplete

on steroids

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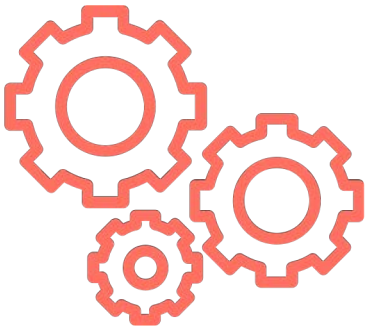
The Sky is…

- Blue
- Clear
- The Limit

Context matters greatly.



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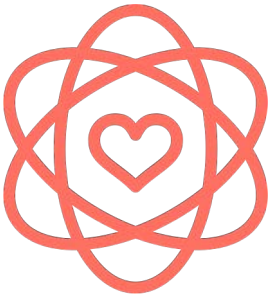
Facts to Keep in Mind

- AI designed to understand & generate human language
- Works based on probabilities of what word comes next
- Probabilistic, not deterministic



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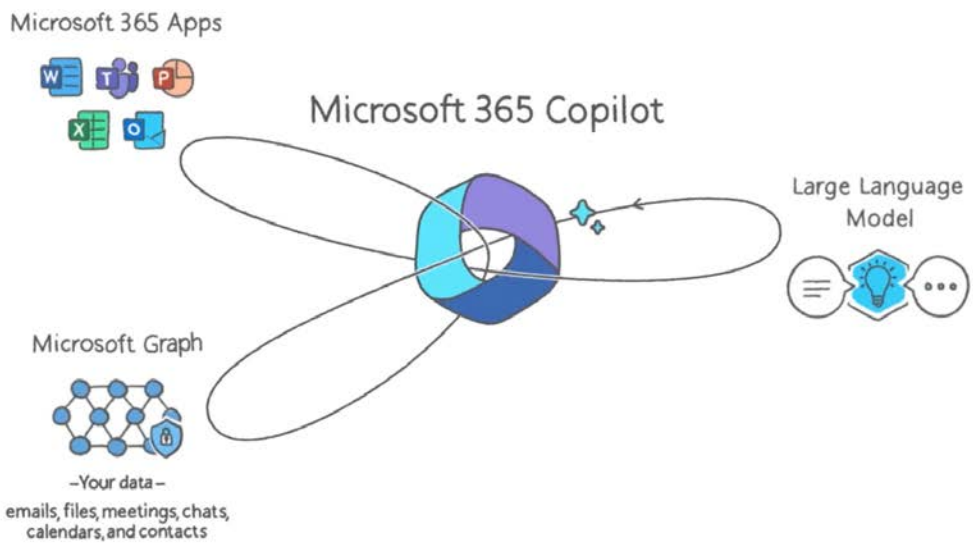
Microsoft 365 Apps
Microsoft 365 Copilot
Large Language Model
Microsoft Graph
–Your data–
emails, files, meetings, chats, calendars, and contacts

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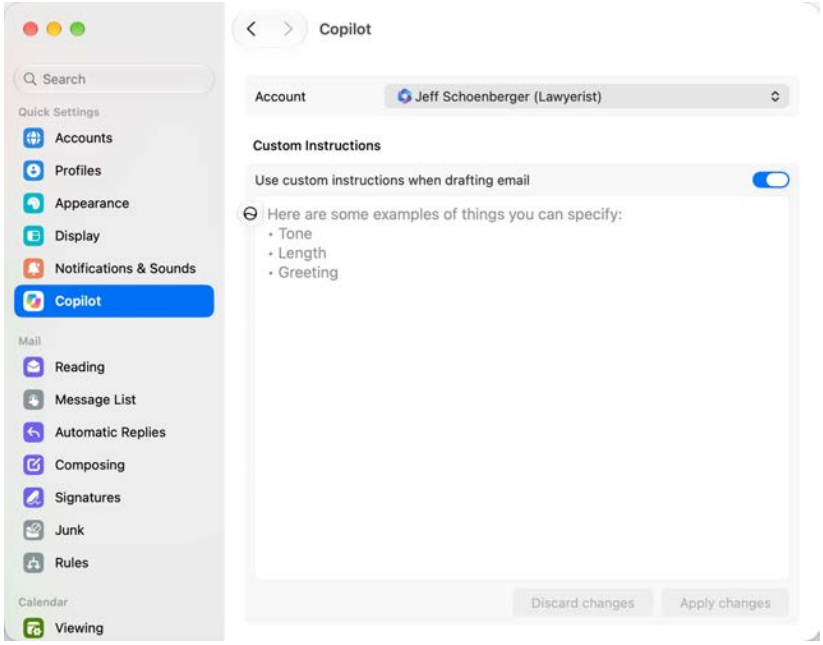

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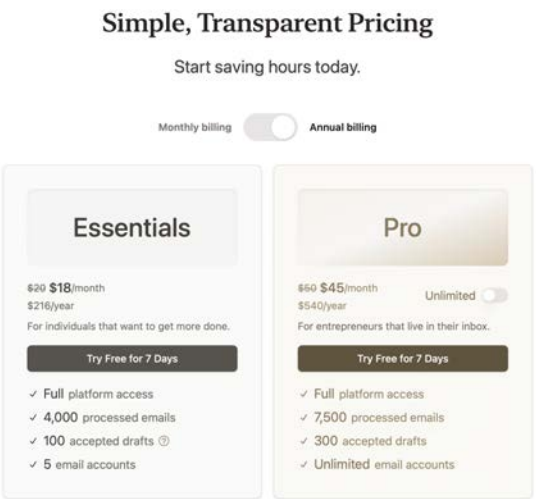
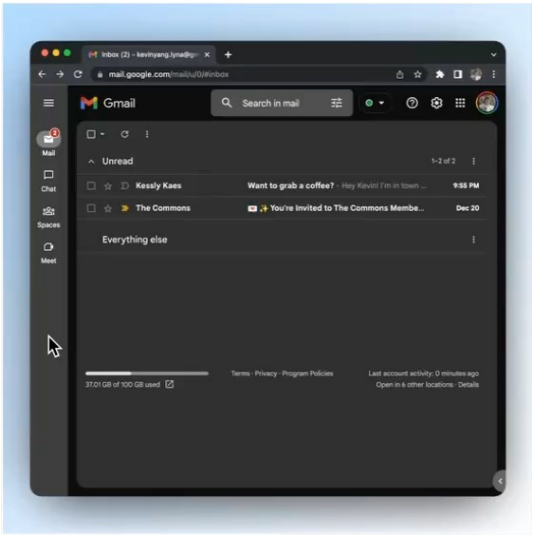
serif

Serif.ai





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Generate a professional follow-up email for any situation.
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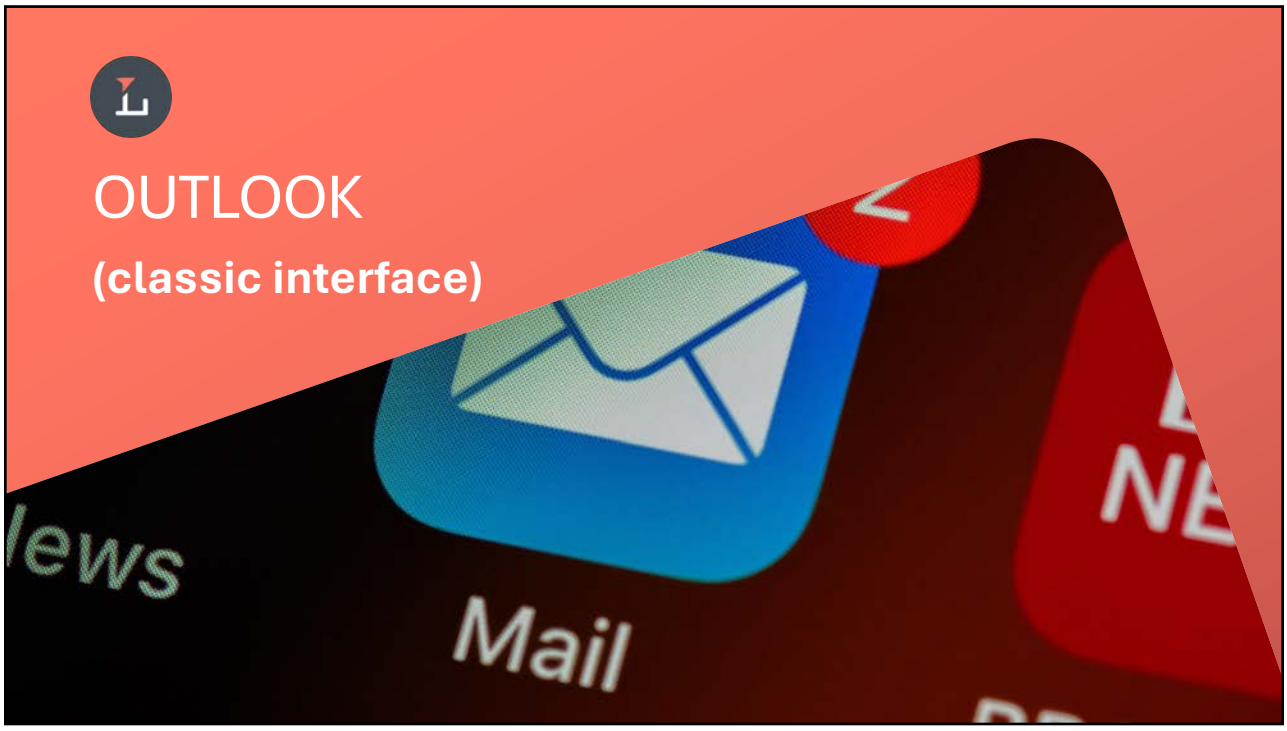
OUTLOOK
(classic interface)
Mail

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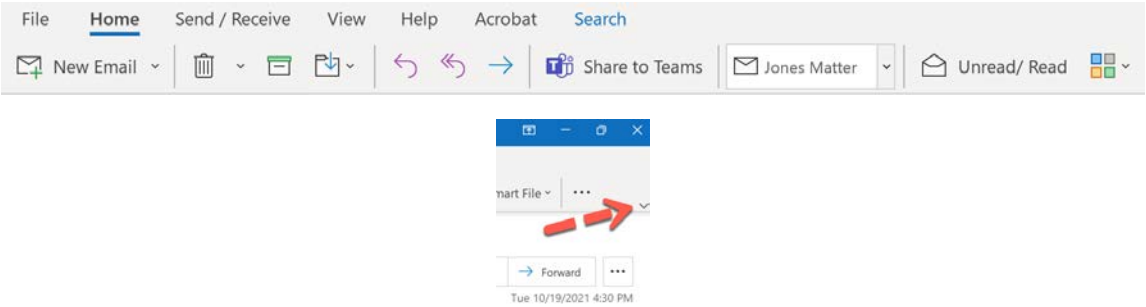
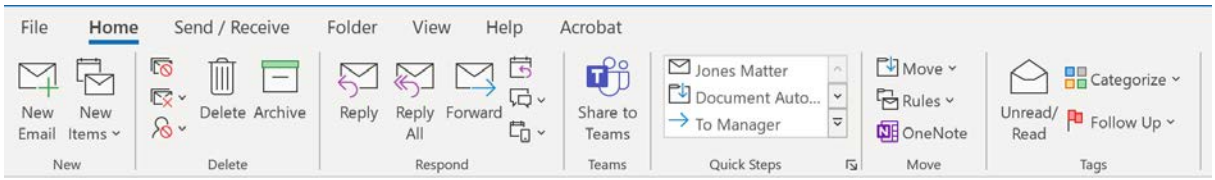
Expand the Ribbon





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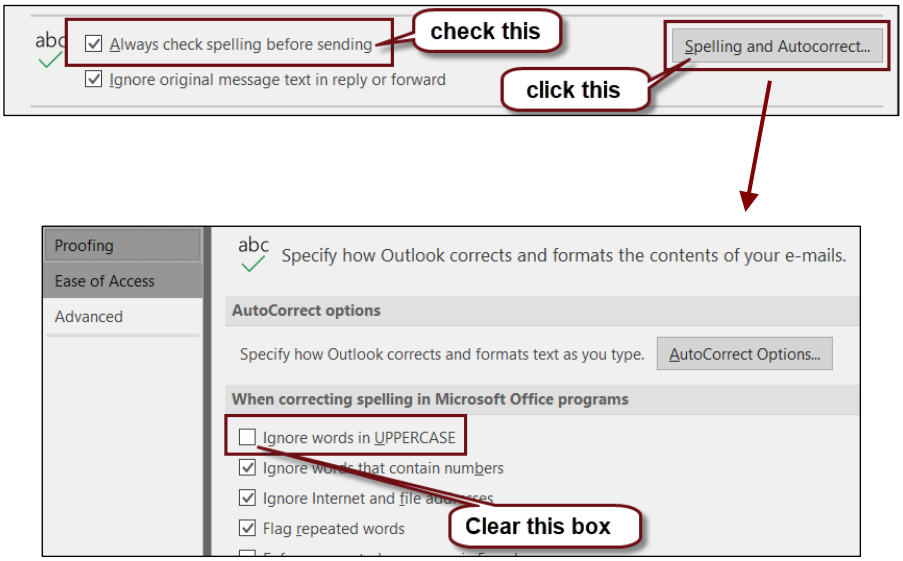
File Menu > Options > Mail



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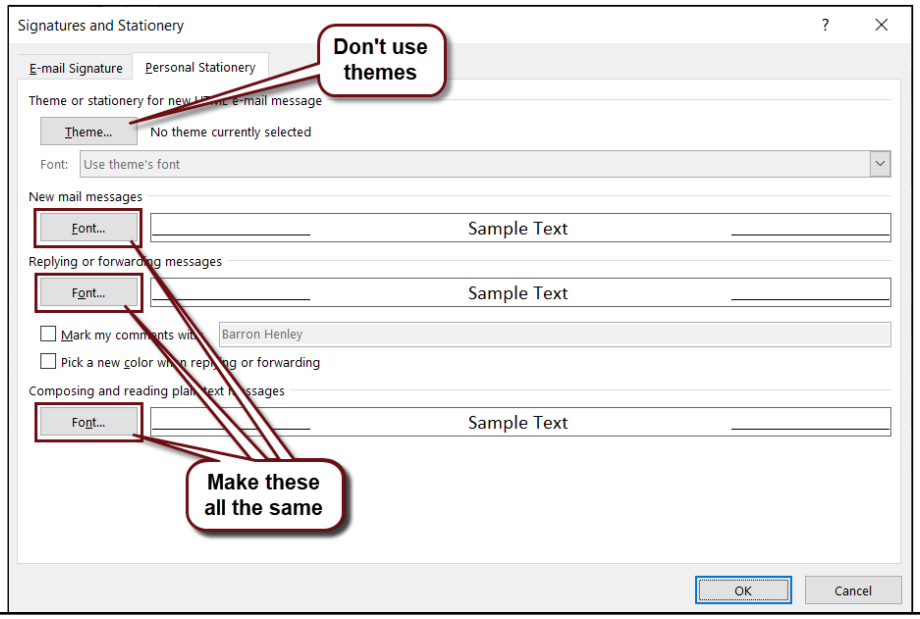
File Menu > Mail > Stationary and Fonts



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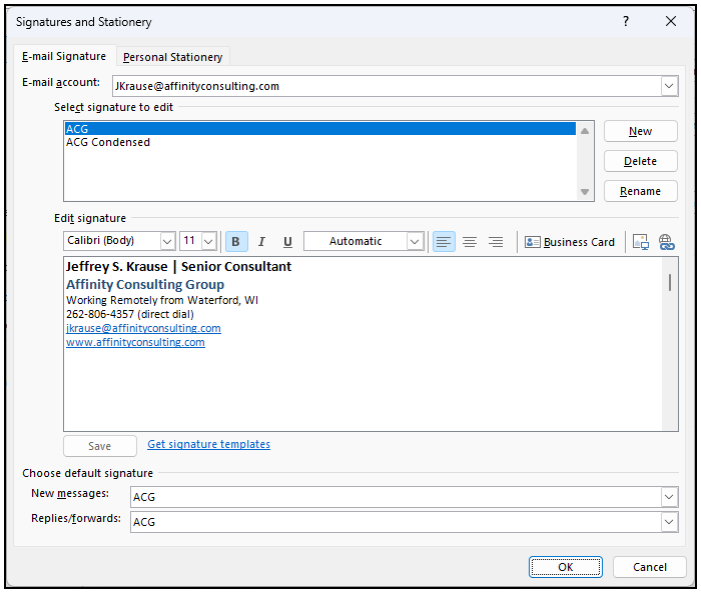
File > Options > Mail > Signatures

- Add signatures
- Apply default signatures
- Use consistent fonts



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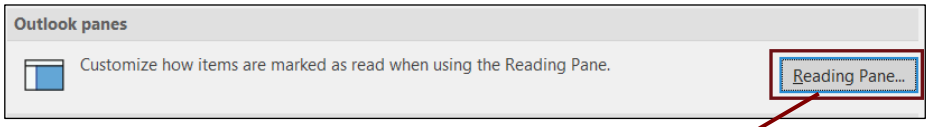
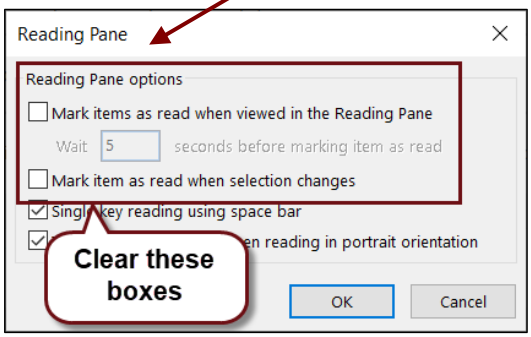
File Menu > Options > Email



Don't like how Outlook marks a message read when you select it in the inbox?

Clear these boxes



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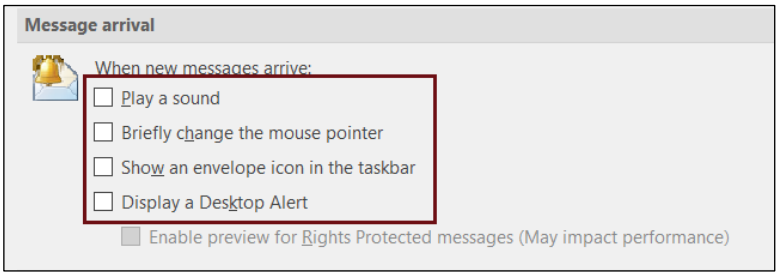
File > Options > Mail > Message Arrival

Email notifications can be a major distraction

Consider clearing these boxes



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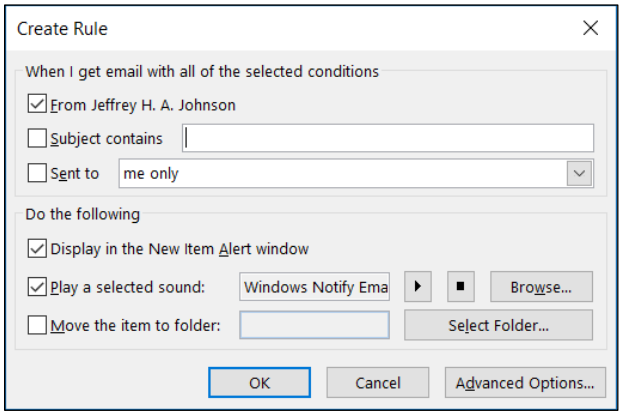
Create Rules for Exceptions

Right click an email > Rules > Create Rule...



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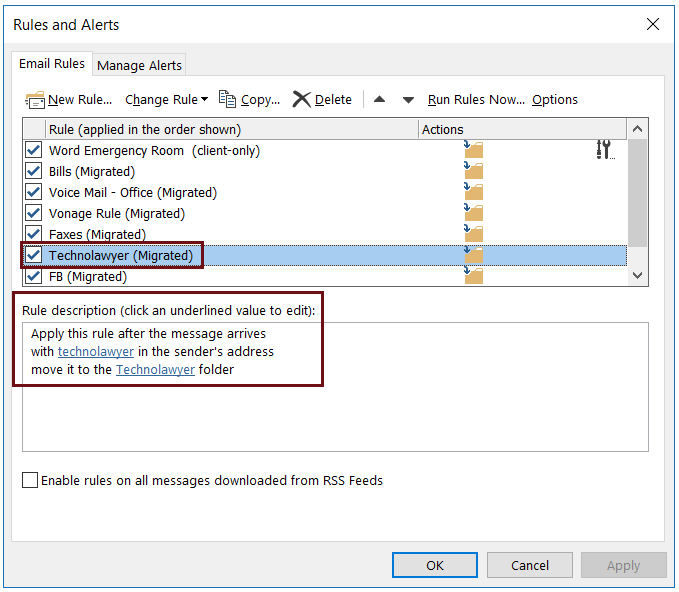
Organize Outlook

Create Outlook Rules



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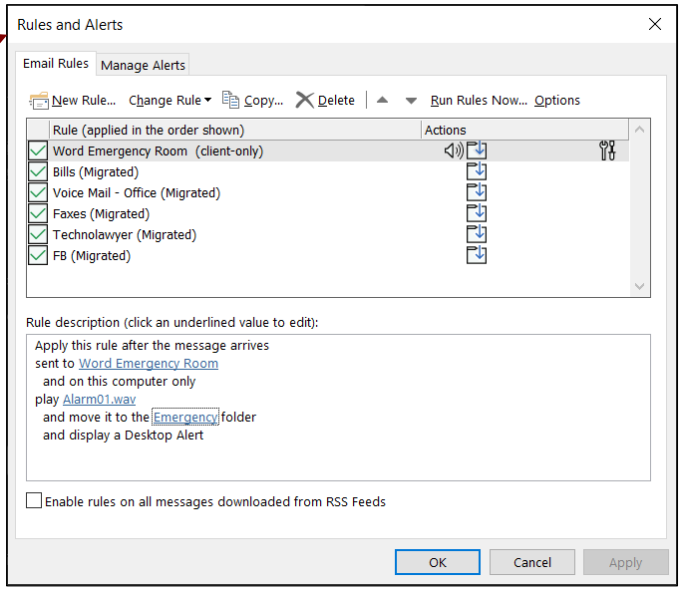
File Menu > Info > Manage Rules & Alerts



- Create rules for notifications
- Automatically file email into folders

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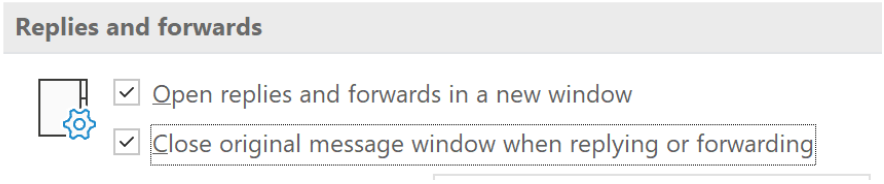
File > Options > Mail > Replies & Forwards



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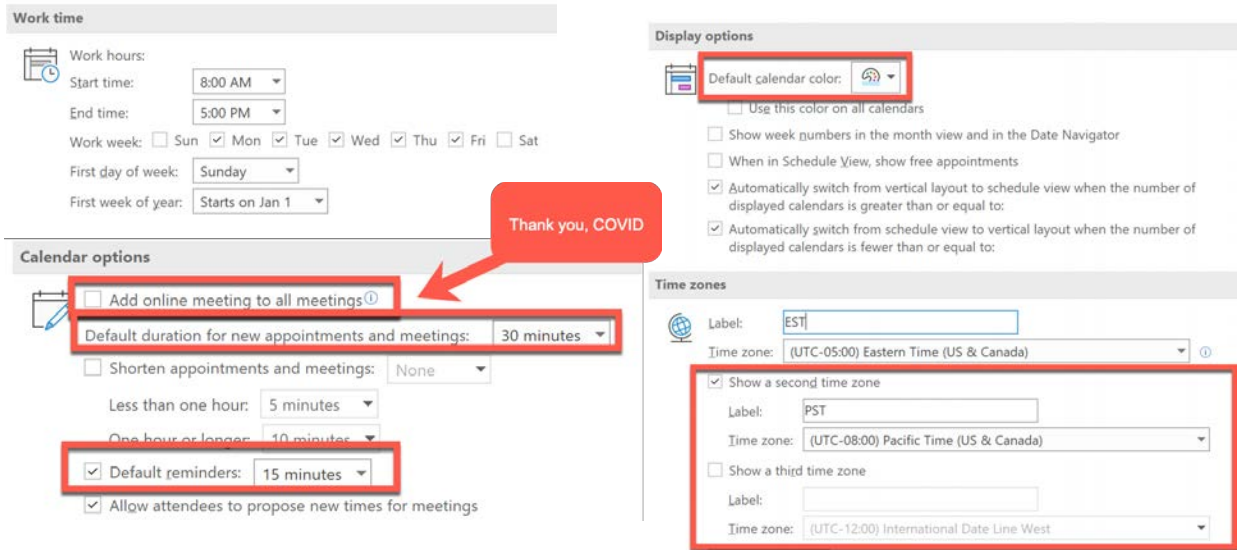
File > Options > Calendar



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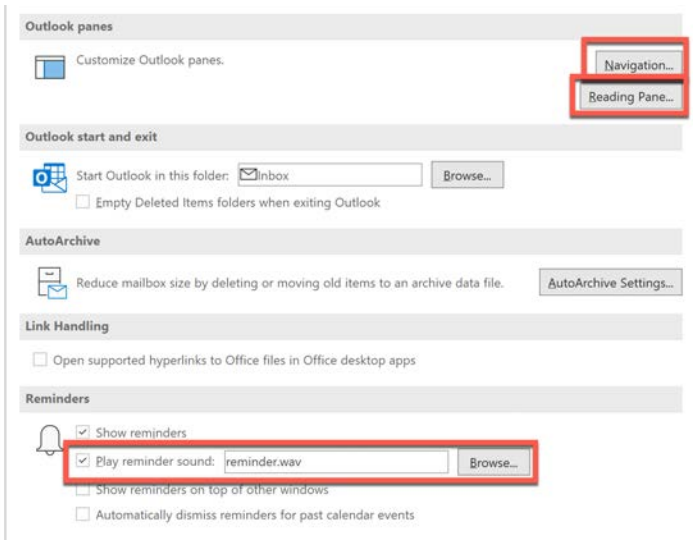
File > Options > Advanced



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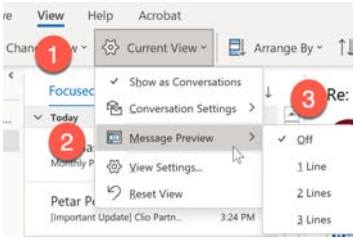
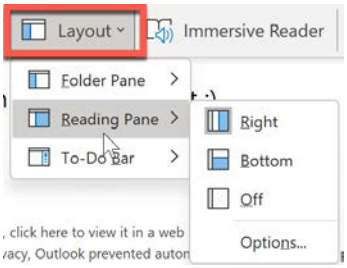
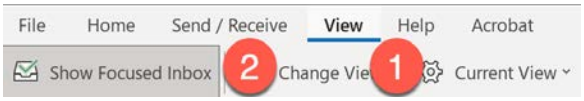
See As Many Emails As Possible

- Turn off Message Preview
- Make Reading Pane right side or off
- Turn off Focused Inbox







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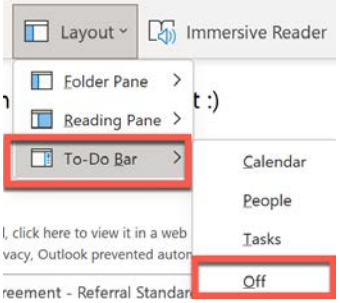
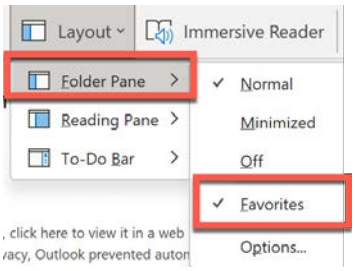
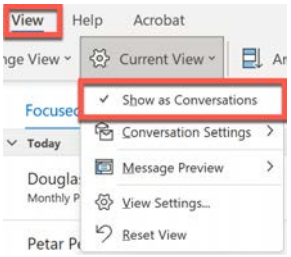
View Settings



Turn off To Do Bar



Turn off Favorites



Show as Conversations

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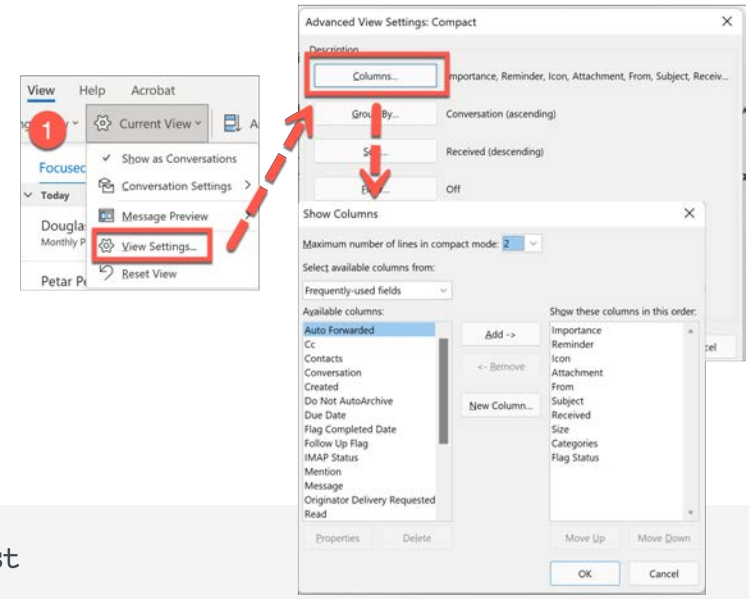
Column Control



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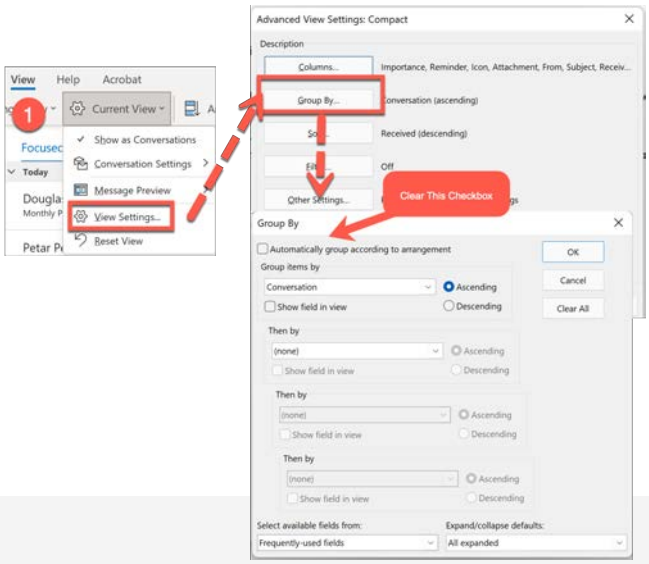
See As Many Emails As Possible



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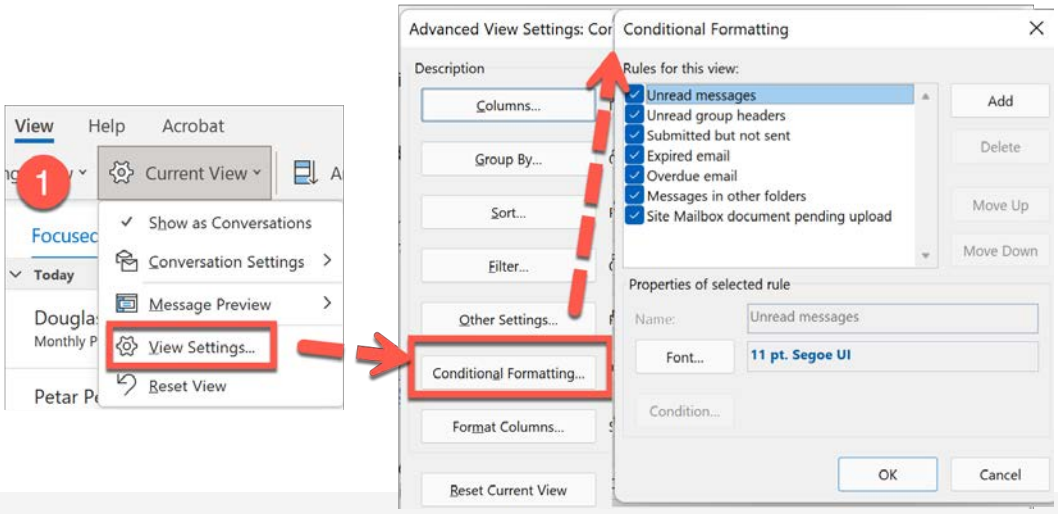
Colorize Your Email



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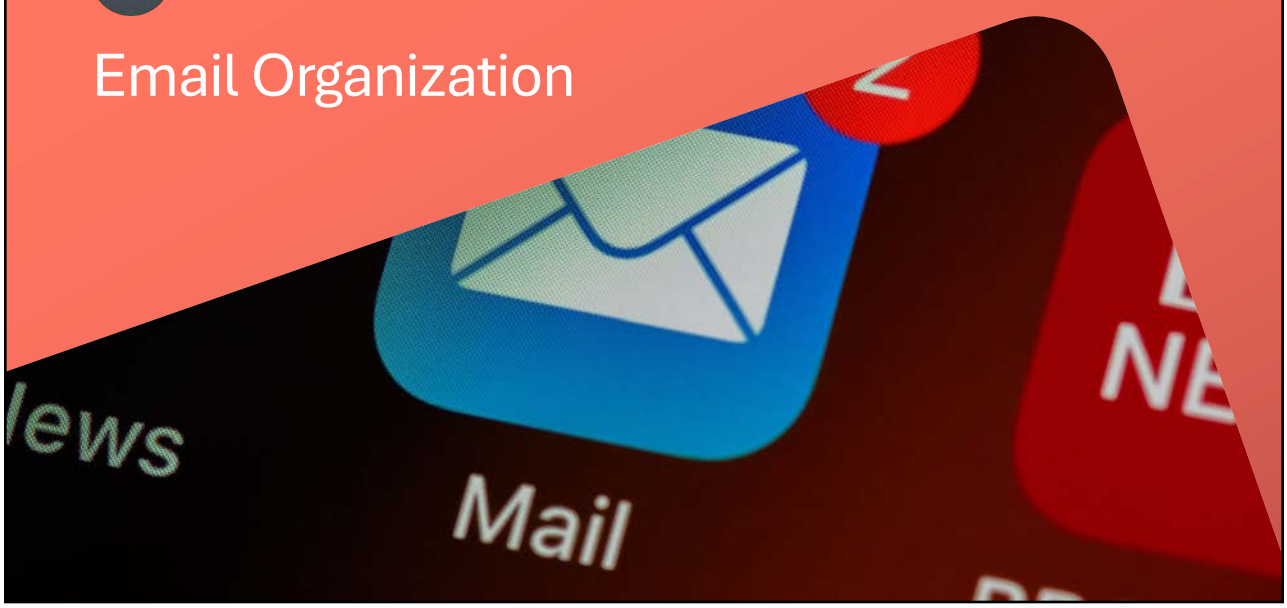
Email Organization



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You can't deal with high volume email unless you have a filing system for it

100,000 emails in your inbox isn't a filing system

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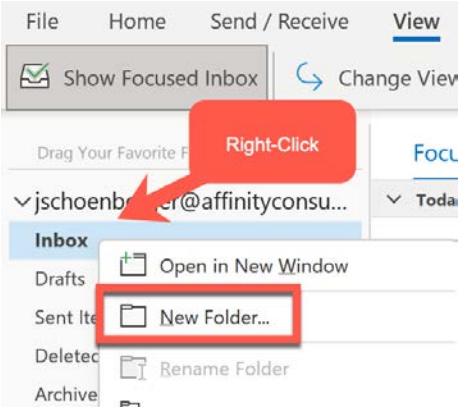
Organize Your Email

Create folders by client and matter



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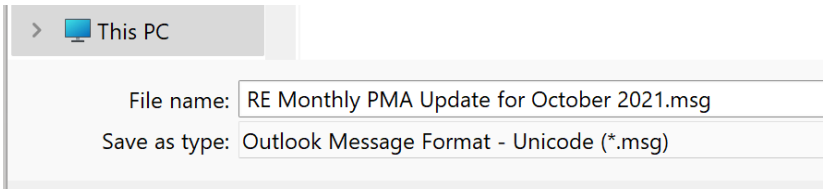
Organize Your Email

- Save email as a file
- Open the email ⇨ File ⇨ Save As



- NOTE: This is risky because there's no guarantee you'll be able to open .msg files in the future

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Organize Your Email

- Save email as a PDF (best practices)
- PDF programs integrate with Outlook
  - Save multiple emails into single PDF
  - Attachments buried in the PDF

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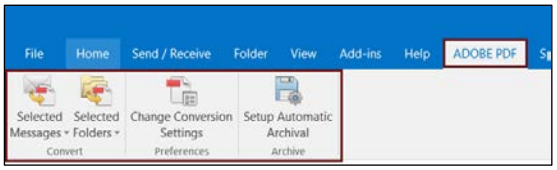
Acrobat Outlook Integration

Other programs offer this as well

- Kofax Power PDF
- Foxit PDF Editor
- Nitro Pro



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Email & Law Practice Management Software

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PRACTICEPANTHER®

CARET Legal

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mycase

rocket matter

SMOKEBALL

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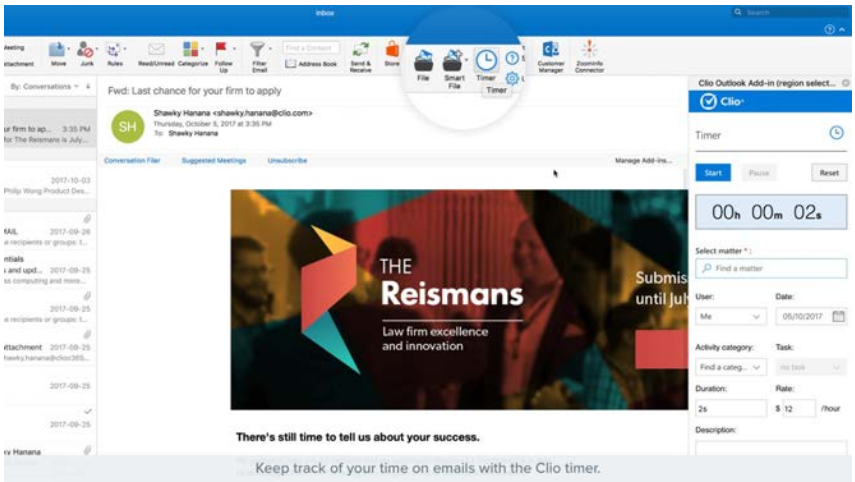
Organize Your Email

Save email into a Case Management System



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Organize Your Email

Save to a document management system

netdocuments®

iManage

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Microsoft Suite

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Email Storage Tips

- Store the email with everything else related to a particular matter
- After filing – delete
- ALWAYS separately save attachments
- Stop printing emails!

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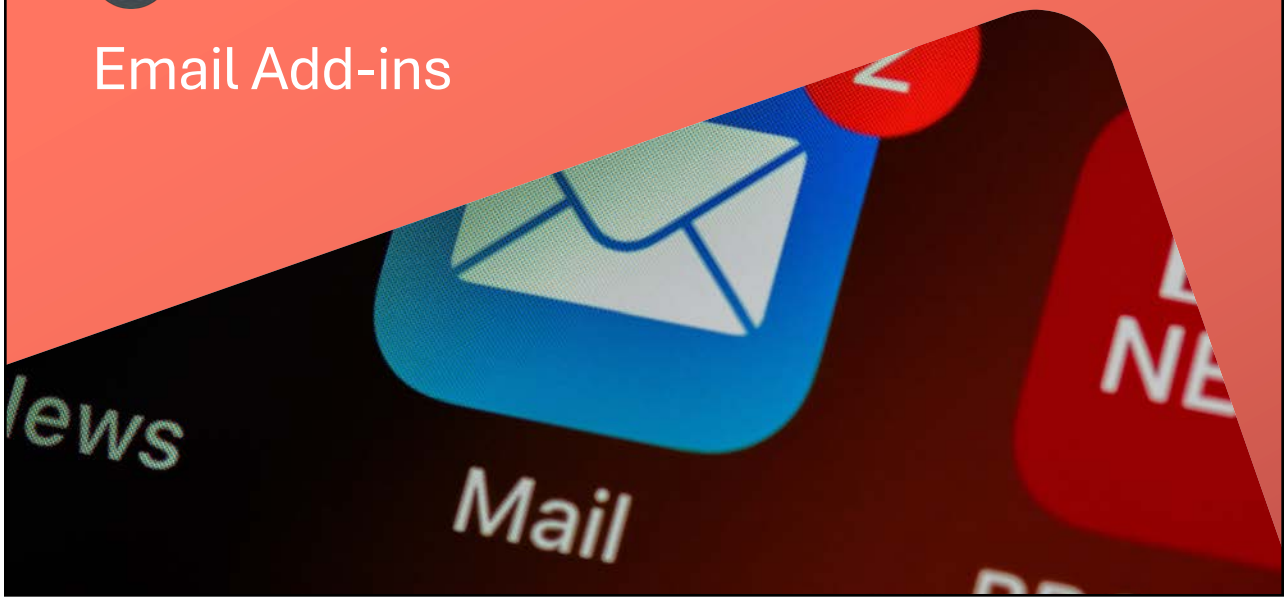
Email Add-ins



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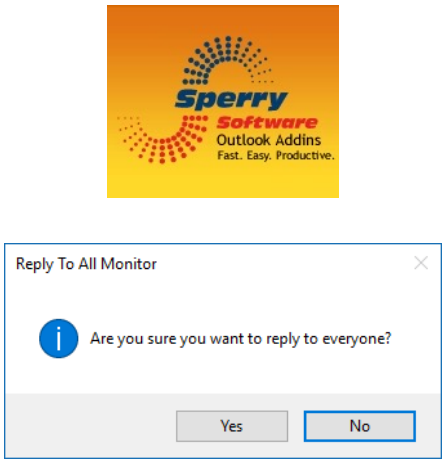
Fantastic Outlook Add Ins

See www.sperrysoftware.com – they have 41 Outlook add-ins

- Zoom Email Windows - $30
- Reply To All Monitor - $30 or Safeguard Send - $12/yr



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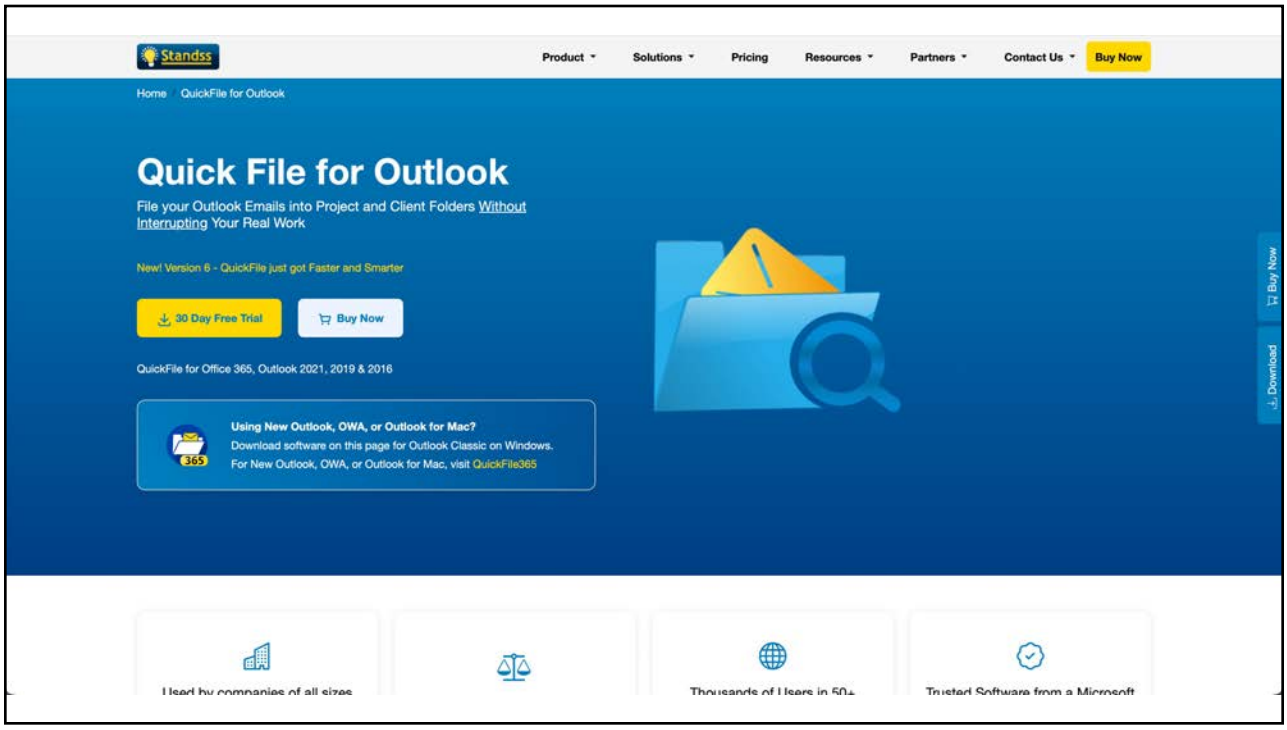
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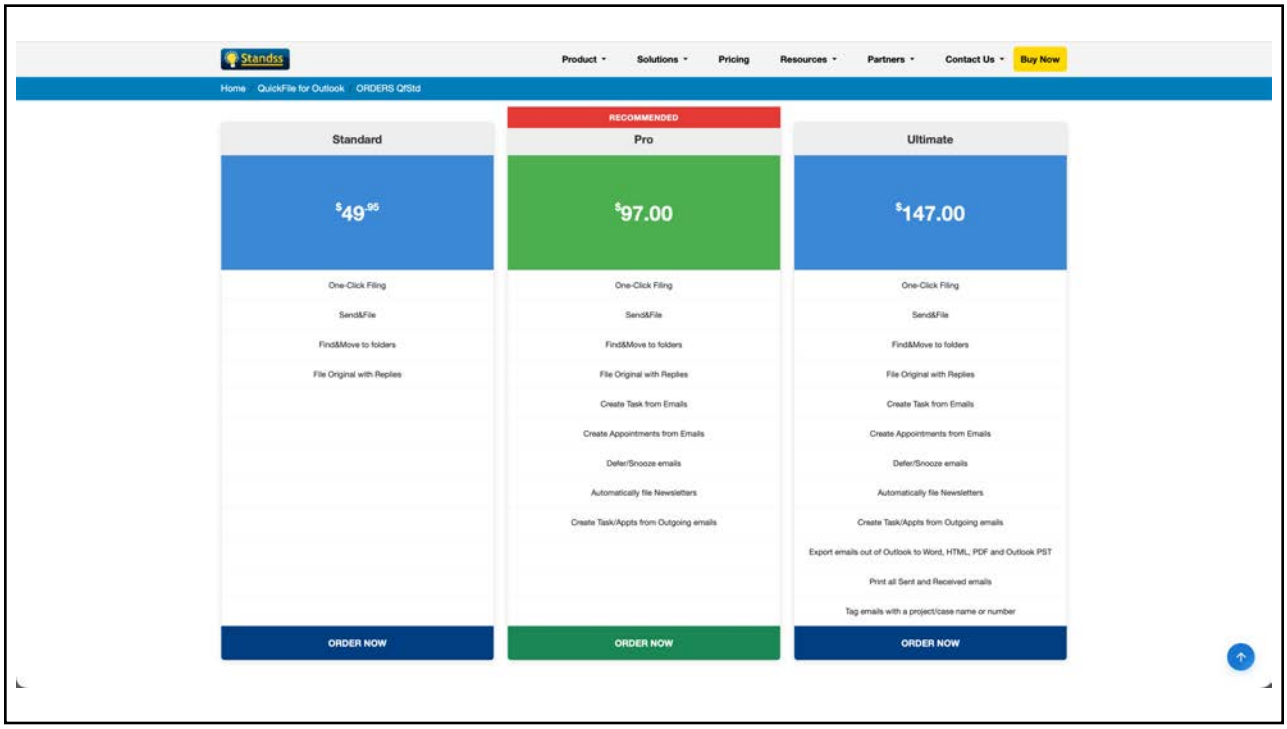
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Defer/Snooze emails
Automatically file Newsletters
Create Task/Appts from Outgoing emails
Export emails out of Outlook to Word, HTML, PDF and Outlook PST
Print all Sent and Received emails
Tag emails with a project/case name or number
ORDER NOW

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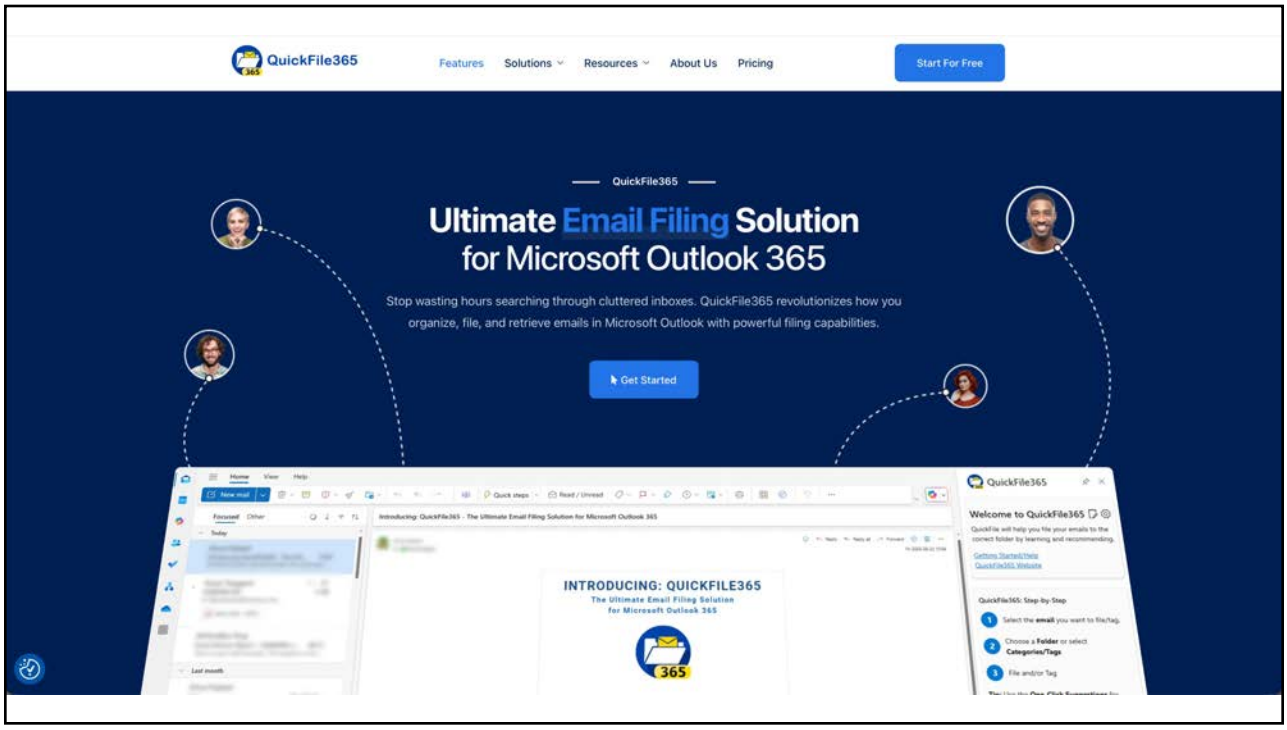
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INTRODUCING: QUICKFILE365
The Ultimate Email Filing Solution for Microsoft Outlook 365
Welcome to QuickFile365

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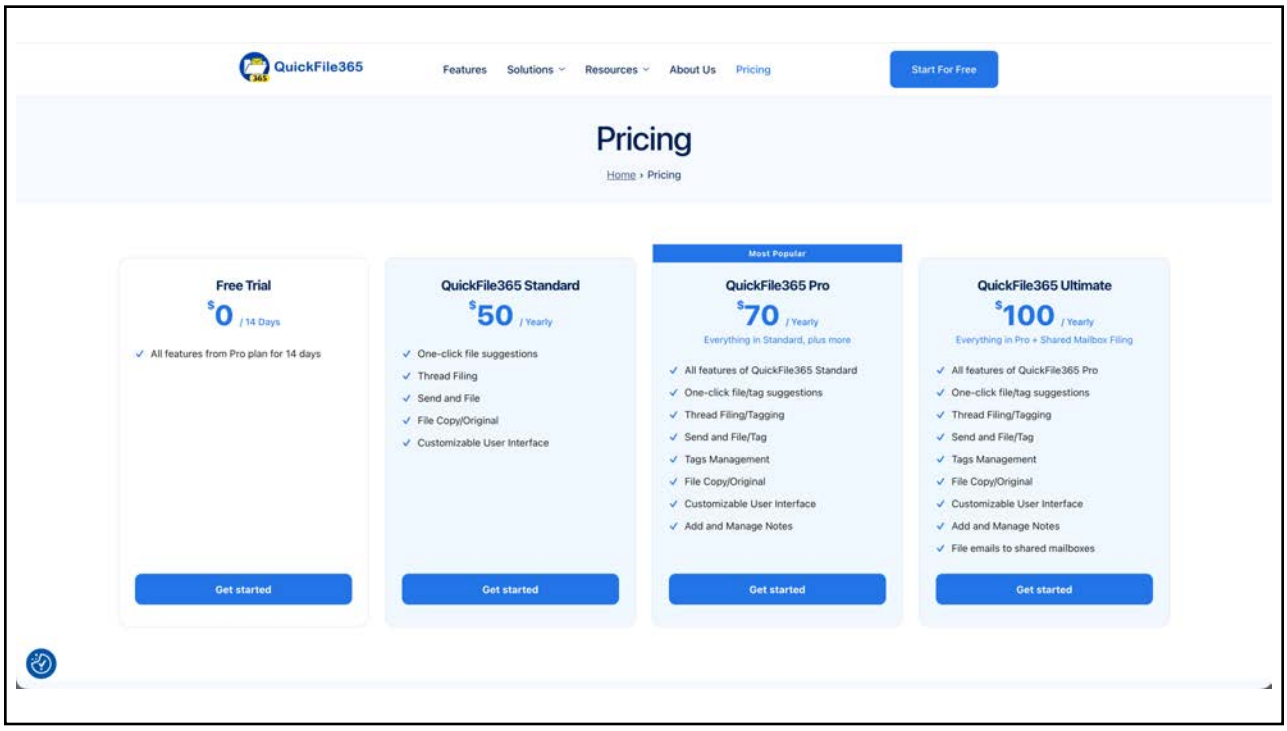
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Customizable User Interface
Add and Manage Notes
Get started
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Send and File/Tag
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Customizable User Interface
Add and Manage Notes
File emails to shared mailboxes
Get started

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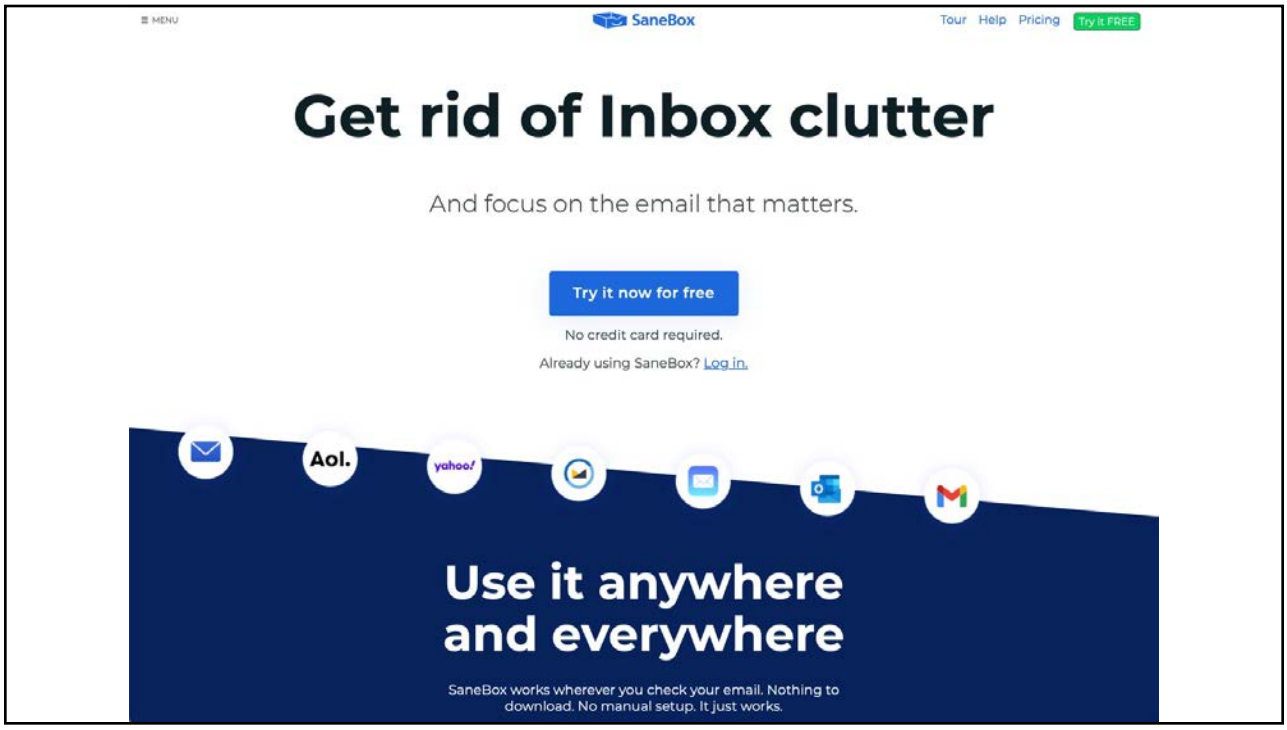
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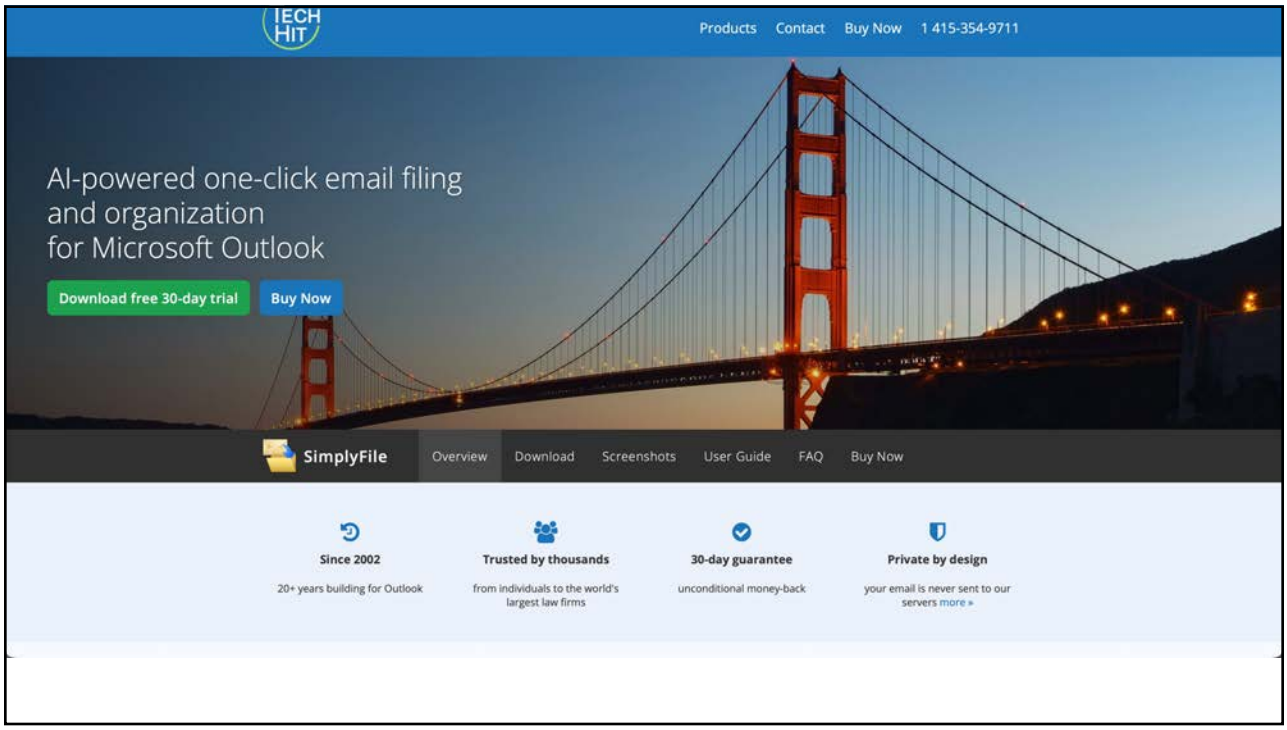
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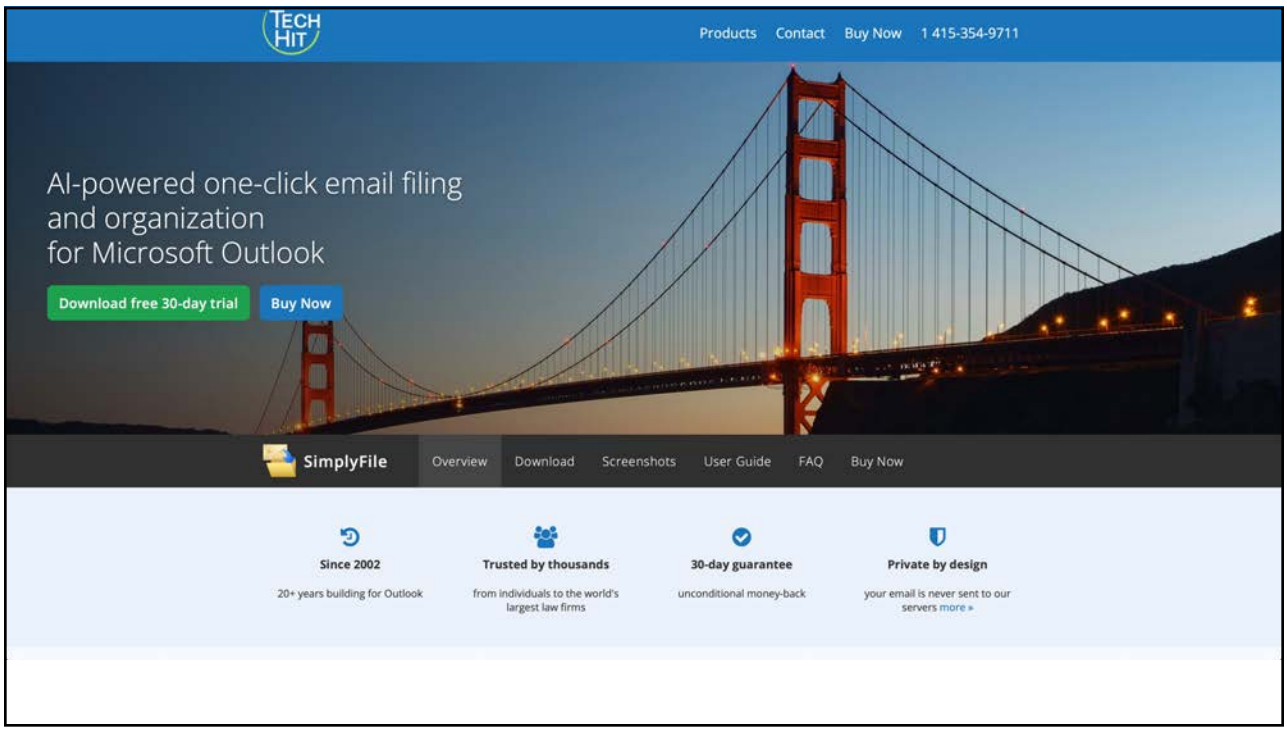

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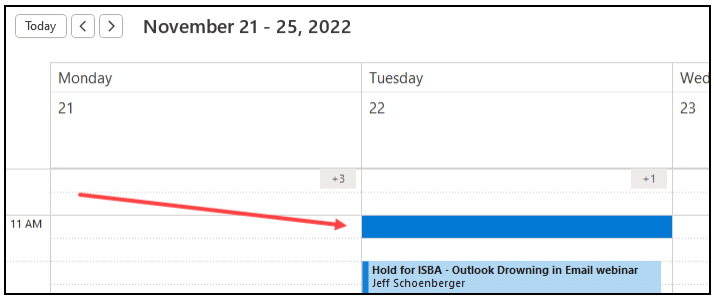
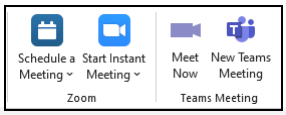
Calendar Add-Ins

Select a day and time



Click to Schedule a meeting



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Email Encryption Recommendations

- Trustifi
- Microsoft 365 Message Encryption (E3 & Up)
- Identillect Delivery Trust

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Why Email Encryption

- New Jersey Rule 1.6(f): A lawyer shall make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to information relating to the representation of a client.
- Comment: When transmitting a communication that includes information relating to the representation of a client, the lawyer must take reasonable precautions to prevent the information from coming into the hands of unintended recipients. … A client may require the lawyer to implement special security measures not required by this Rule …

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Outlook Tips & Tricks

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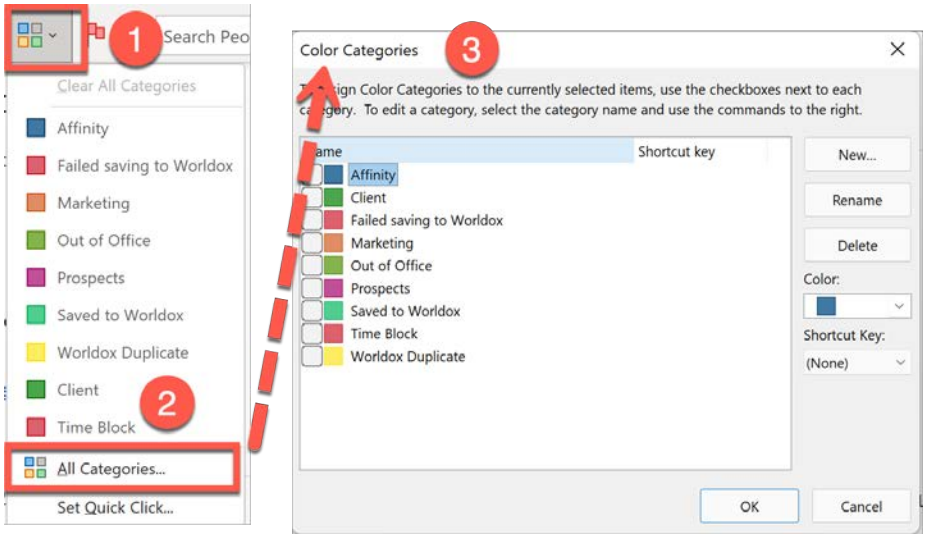
Use Categories

On Home ribbon

Or an open email



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Switch Signatures

Either click the button:

Or right-click the signature

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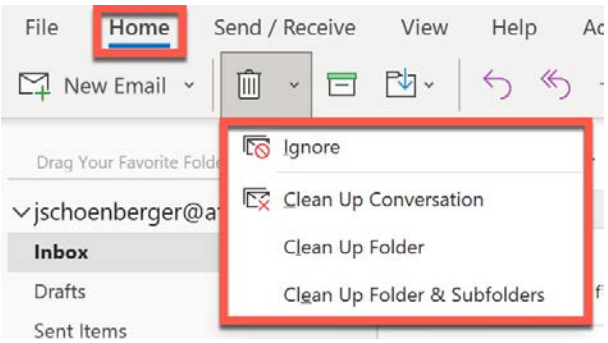
Conversation Cleanup

Get rid of redundant email with the Clean Up function



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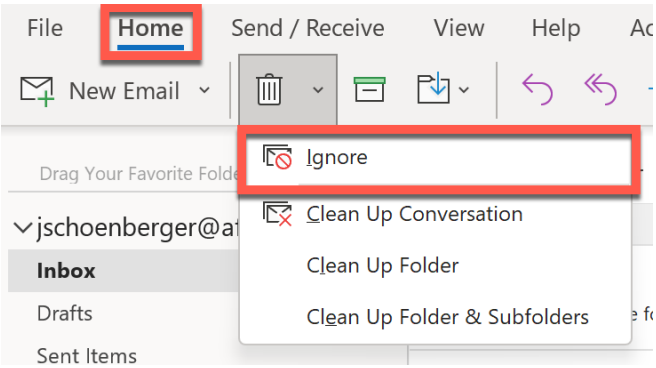
Ignore a Conversation

Is your email address in an annoying conversation thread you don't care about?



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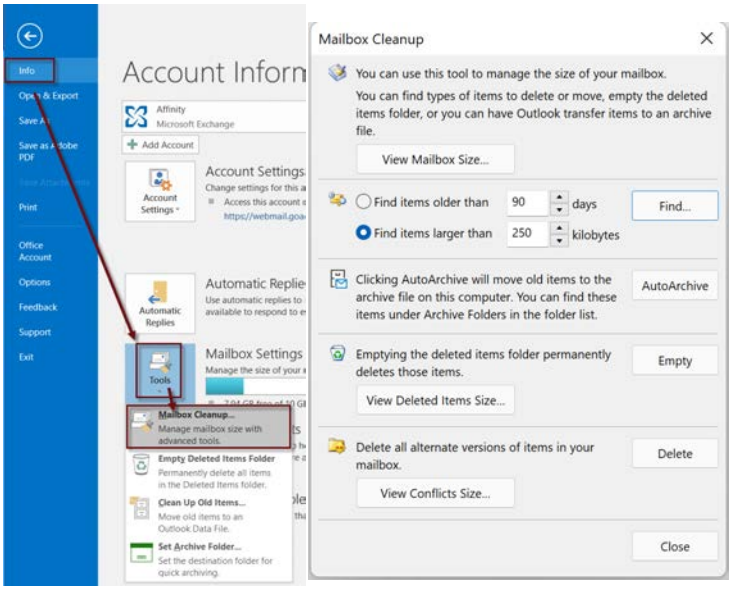
Mailbox Cleanup



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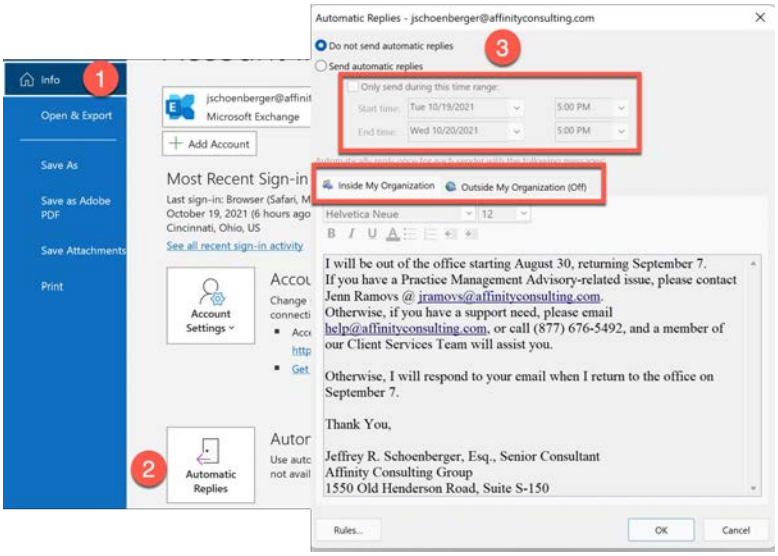
Automatic Replies

Use when you're out of the office (requires Exchange)



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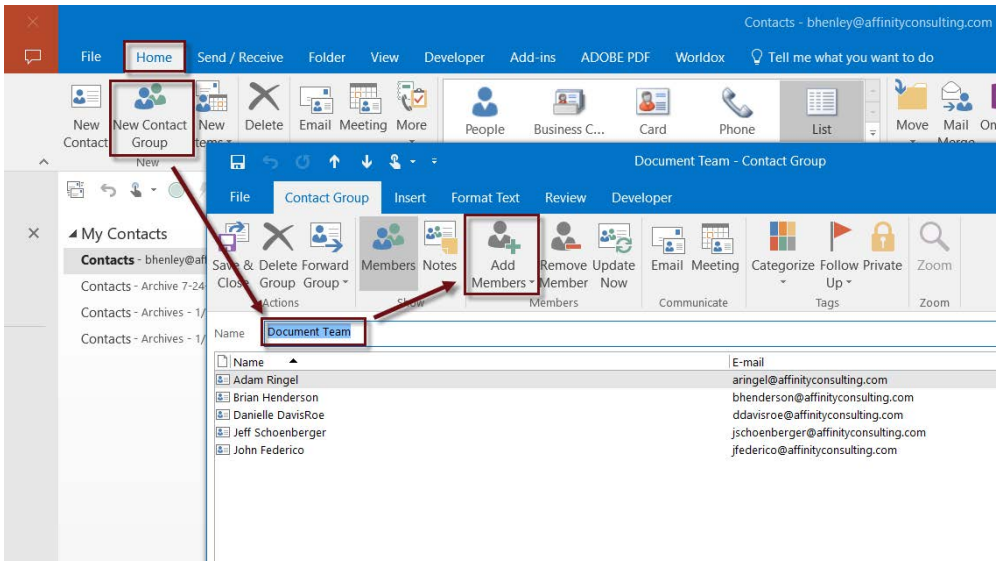
Contact Groups for Email



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Speed Keys

- Mail = Ctrl + 1
- Calendar = Ctrl + 2
- Contacts = Ctrl + 3
- Tasks = Ctrl + 4

- Create new email = Ctrl + Shift + M
- Create new appt = Ctrl + Shift + A
- Create new contact = Ctrl + Shift + C
- Create new task = Ctrl + Shift + K

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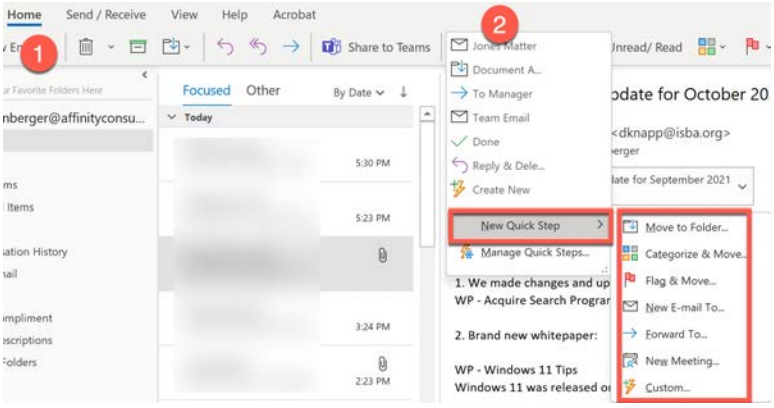
Quick Steps

- Create buttons that automate tasks
  - Move email to a folder
  - Forward an email to multiple people
  - Permanently delete



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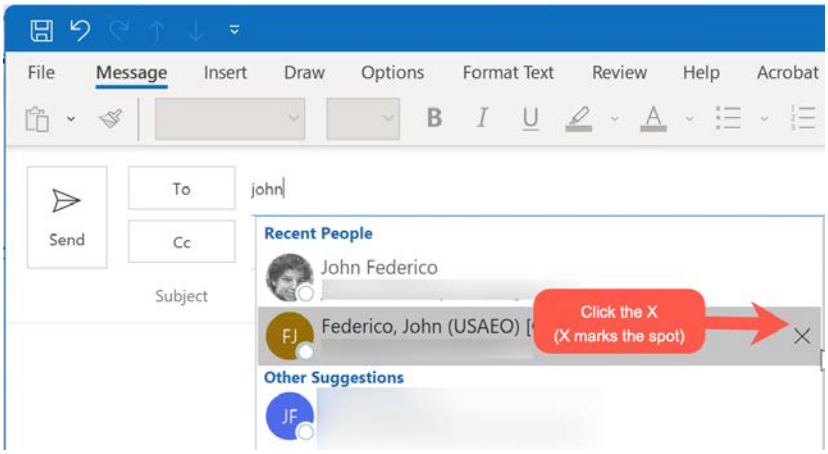
Edit AutoComplete List

- Easy to send to wrong person
- How to delete AutoComplete entries:



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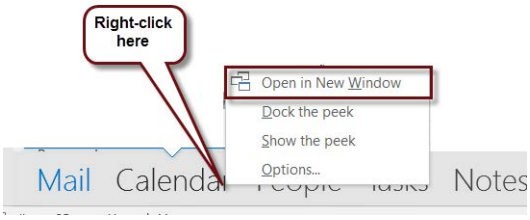
Open 2nd Window of Outlook



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Benefits of Dragging

- Drag = move it
- Ctrl + drag = make a copy and leave original
- Drag email to tasks or calendar = new task or appt

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Outlook Calendar Tips

- Cherry-pick days to view
- Paste or drag documents into appointment

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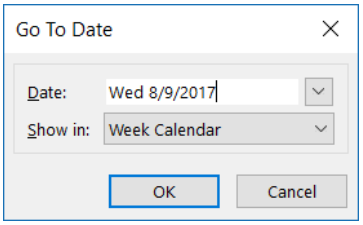
Jump To A Date

In Calendar, Ctrl + G



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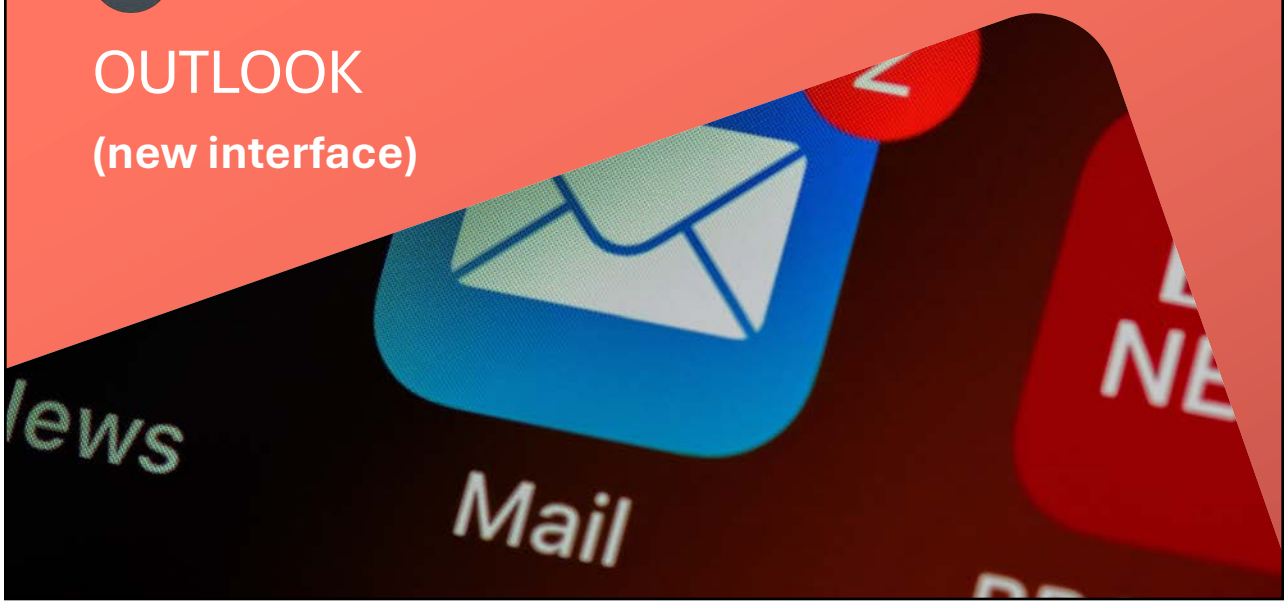
OUTLOOK

(new interface)



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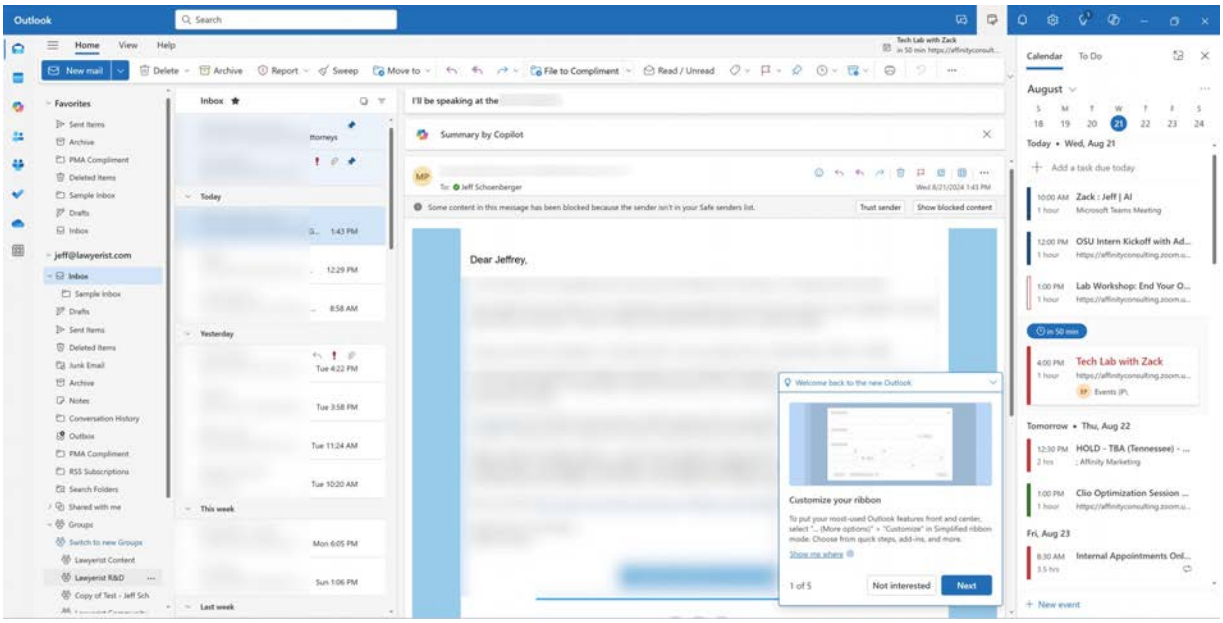
Primer on the New Outlook



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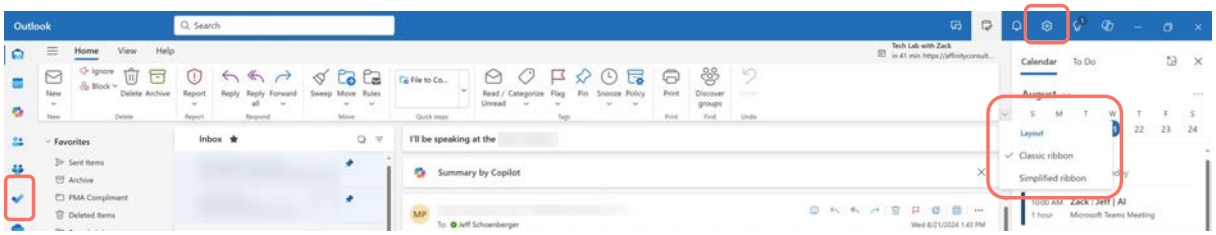
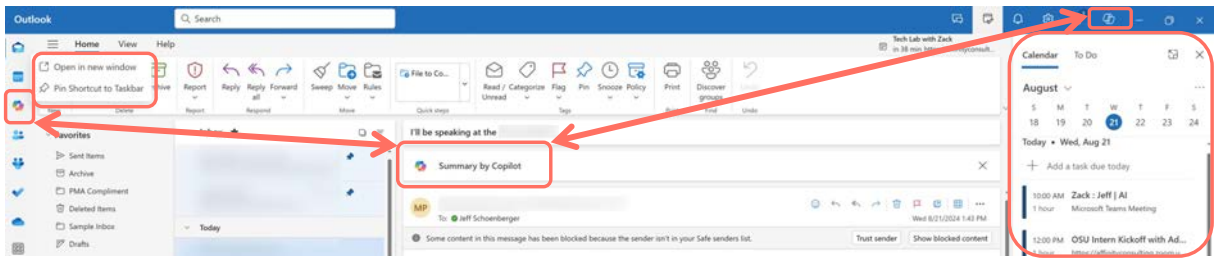
Primer on the New Outlook





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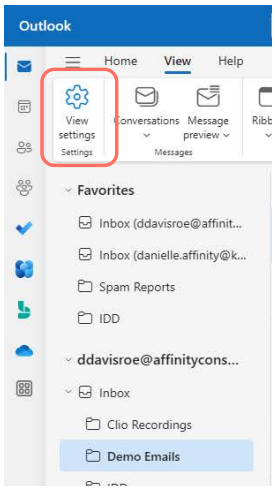
View Settings



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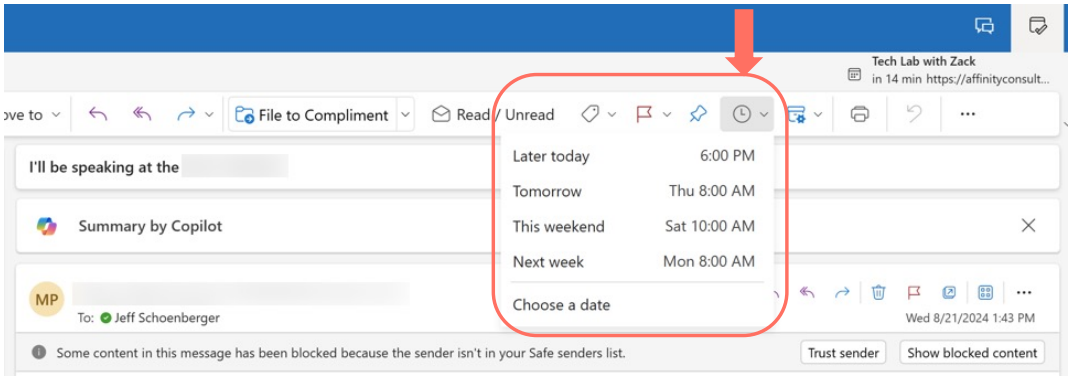
Snooze Emails



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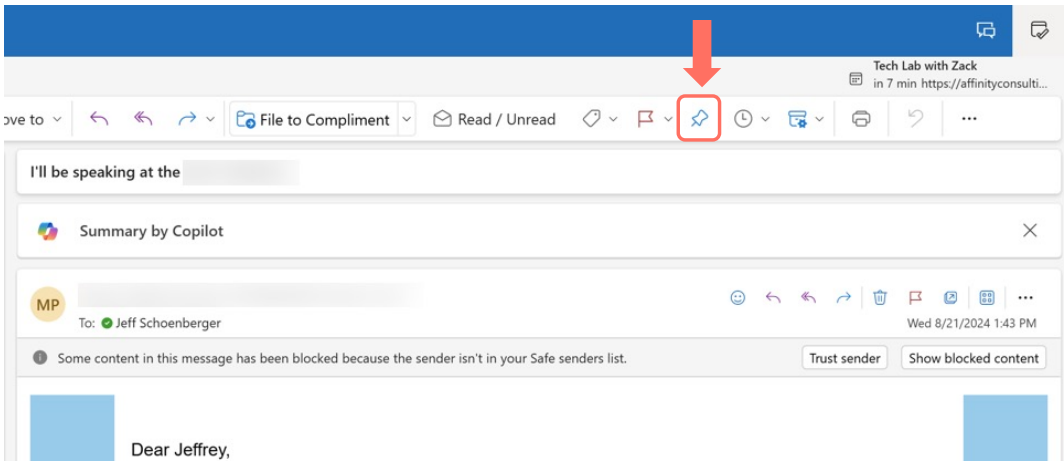
Pin Emails



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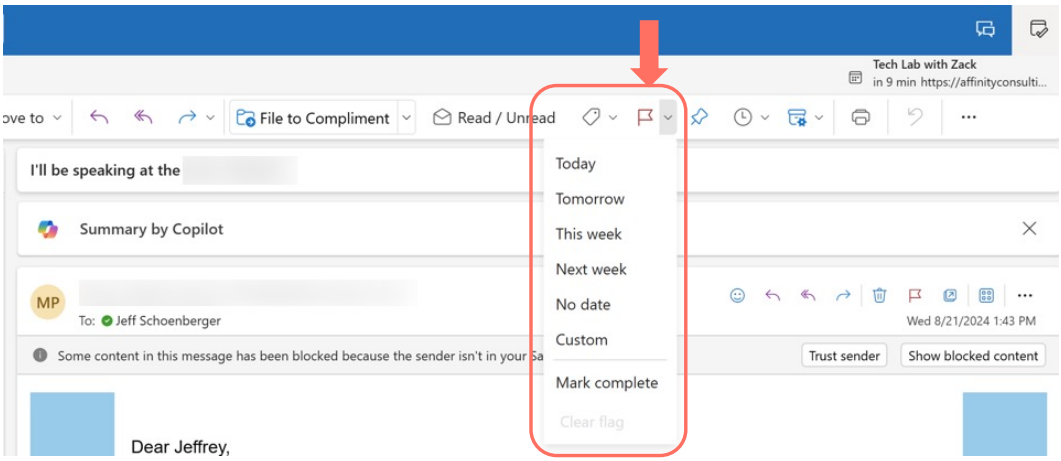
Flag Emails



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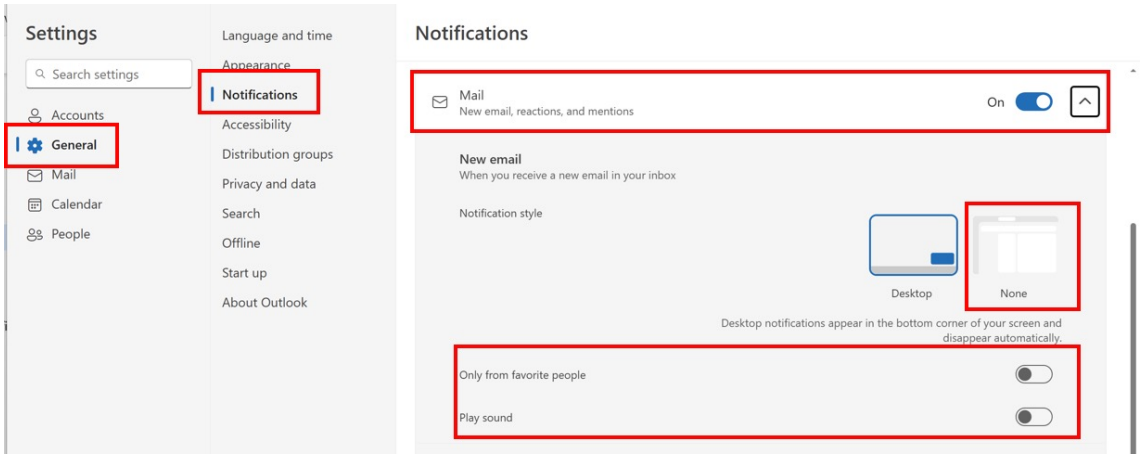
Dial Down Distraction



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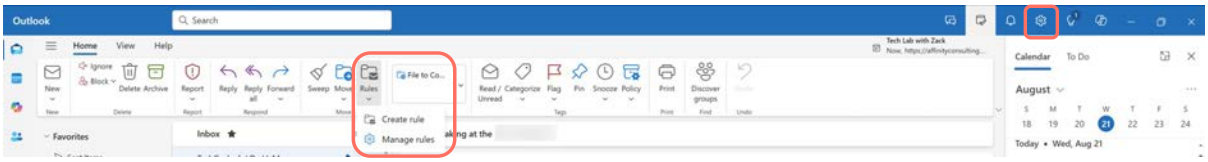
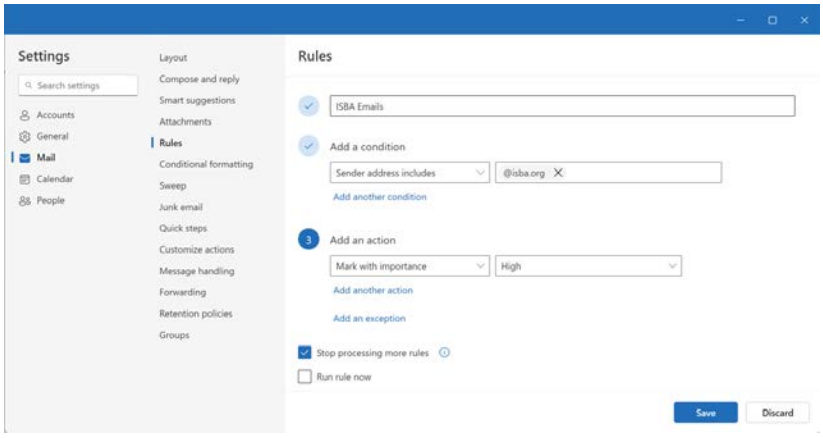
Rules





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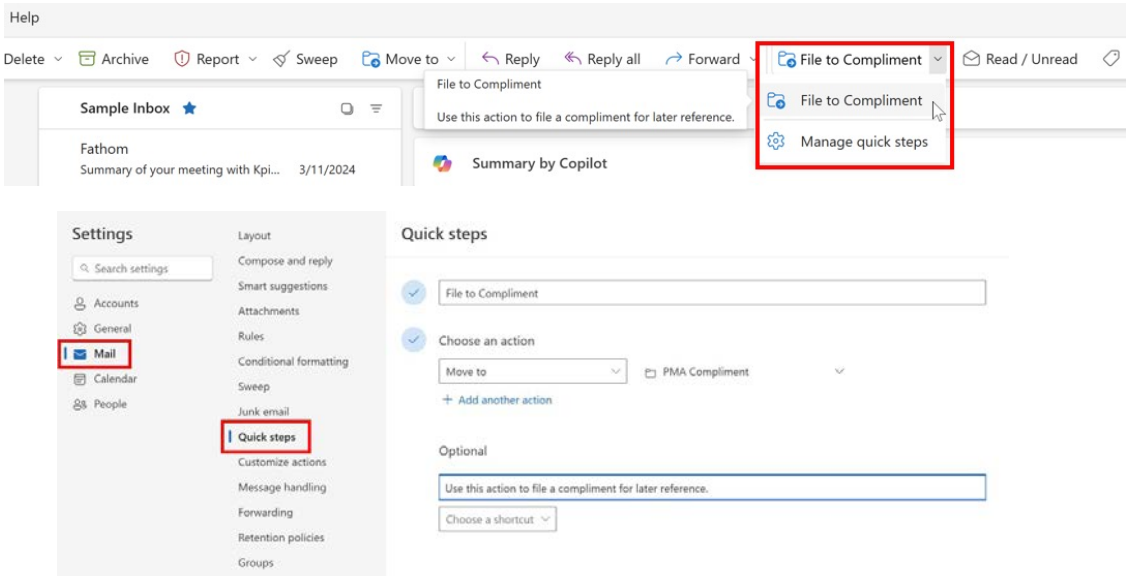
Quick Steps



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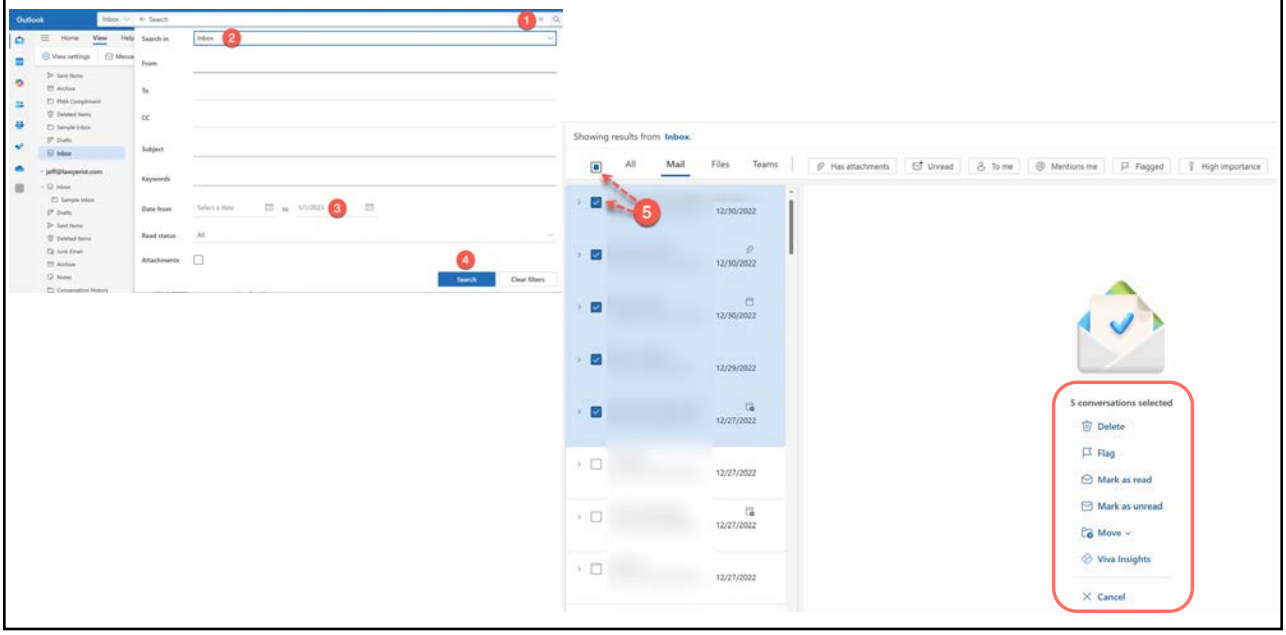
Declare Email Bankruptcy



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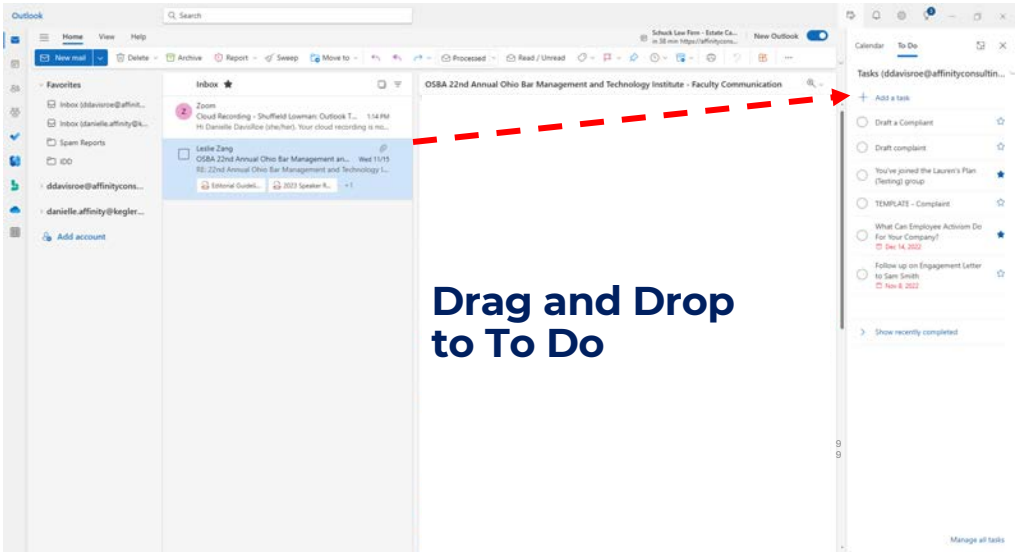
Drag and Drop to Convert



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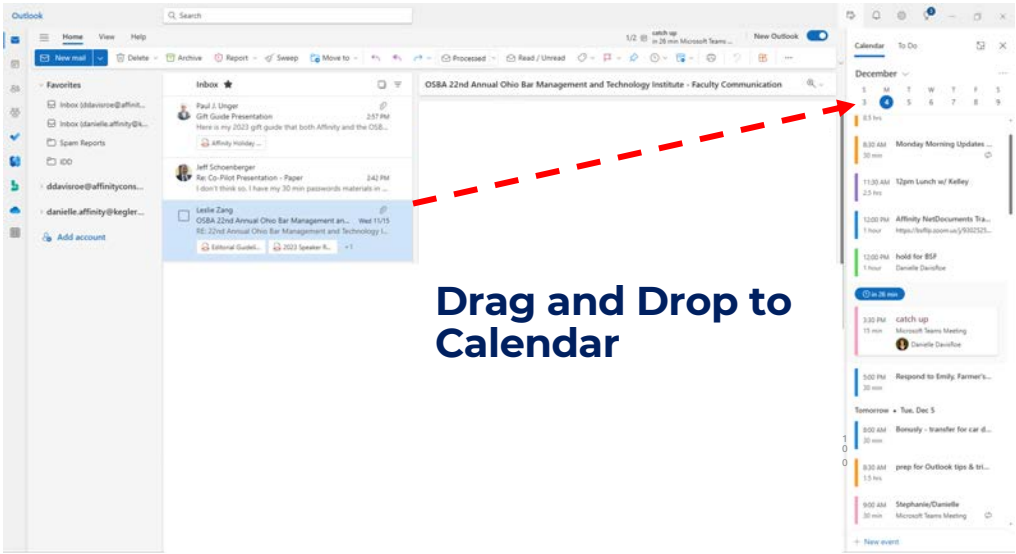
Drag and Drop to Convert



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Switch Signatures

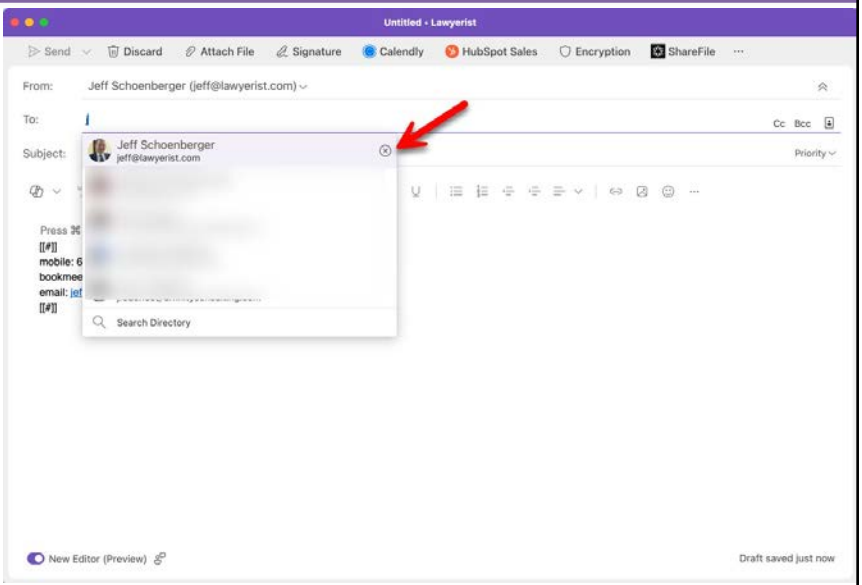
Either click the button:

Or right-click the signature

101

Edit AutoComplete List

- Easy to send to wrong person
- How to delete AutoComplete entries:



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Speed Keys

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- Contacts = Ctrl + 3
- Tasks = Ctrl + 4

- Create new email = Ctrl + Shift + M
- Create new appt = Ctrl + Shift + A
- Create new contact = Ctrl + Shift + C
- Create new task = Ctrl + Shift + K

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Time Management Takeaways

- Work from a task list, not email
- Check email with intentionality
  - Get an hourglass if you need to
- When you check email – **4Ds**:
  - do
  - delegate
  - delete
  - delay → put it on your task list

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Next Steps

- Select something
  (start simple with one board/list/folder)
- add every task you can think of
- clean out your email inbox
  (get it on your task list)
- add deadlines
  (or the date you next to need to work on something)
- start working from the deadlines
- find a way to double check for tasks w/out deadlines

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Jeff@lawyerist.com

(the key is to just get started)

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TAME THE DIGITAL CHAOS FOR LEGAL PROFESSIONALS

HOW TO MANAGE YOUR WORKLOAD
DISTRACTION, TIME, TASK & EMAIL MANAGEMENT

Paul J. Unger, Esq.

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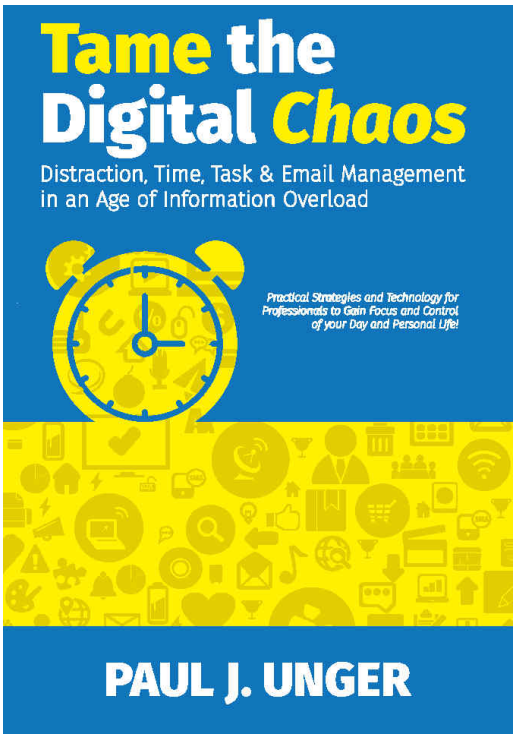
EXCERPTS FROM TAME THE DIGITAL CHAOS ®



Materials contained below are excerpts from the full book, *Tame the Digital Chaos – Distraction, Time, Task & Email Management in an Age of Information Overload*.

How to Order Copies of the TDC Book or the TDC Daily/Weekly Planner:

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- www.pauljunger.com
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Meet the Author

Paul J. Unger, Esq.

Paul J. Unger is a nationally-recognized speaker, author, and thought-leader in the legal technology industry. He is an attorney and founding principal of Affinity Consulting Group, a nationwide consulting company providing legal technology consulting, continuing legal education, and training. He is the author of dozens legal technology manuals and publications, including recently published books *Fight the Paper* (2019) and *PowerPoint in an Hour for Lawyers* (2014). He served as Chair of the ABA Legal Technology Resource Center (2012-13, 2013-14) (www.lawtechnology.org) and Chair of ABA TECHSHOW (2011) (www.techshow.com). Mr. Unger now spends most of his time speaking, coaching, leading professional development programs for lawyers, and conducting technology and practice management assessments.

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INTRODUCTION

THE PROBLEM WITH TIME IN THE AGE OF "INFOMANIA"

The goal of this program is simple—to teach you time and task management skills and to help you cultivate the habits you need to make technology your servant so that you can regain control of your workday and personal life.

Technology is supposed to be our servant. However, for most of us, we have become a servant to technology. We need to turn that scenario around, and make technology work for us, not against us. Technology is supposed to be helping us do more in less time, but instead, it is controlling us in a very negative way. You've heard it—do more in less time and go home early, right? What happened to that? In my humble opinion, we have done the opposite. We have all become so dazzled by technology that we have lost all common sense. I hear comments all the time like:

"I can't get anything done because I get so many emails every day!"

"My work piles up because of all my interruptions."

"I do better with good old-fashioned paper."

"I can't keep track of my tasks . . . I constantly let things slip between the cracks."

Managing tasks and time is a problem that has been around for centuries. Most of us wish that we had another few hours a day to get things done. For most of us, technology has hurt us almost as much as it has helped us. With all the emails, instant messages, smartphones, social media posts, laptop computers, and tablets, we cannot escape the endless number of interruptions that prevent us from focusing and "being present" to tackle all that we must do every single day.

To compound the problem, most professionals are a digital mess! To achieve effective time, document, and email management, we must "get organized." To be organized today, we absolutely must figure out how to manage digital information. According to one study, we receive via digital delivery (email, text, and social media on our phones, computers, etc.), the equivalent of 140 newspapers of information per day. This can be overwhelming, especially if you do not have a system in place to process that digital information.

As one example, approximately 1 attorney in 10 have eliminated over 90% of paper files. In other words, only 1 in 10 have stopped maintaining a paper file and rely solely on a digital file. Quite frankly, this is terrible.

The good news is that the tools necessary to eliminate paper are available, easy to use, and inexpensive. Of course, this hasn't always been the case. Back in the '90s, scanners were very expensive and relatively slow. Document management systems weren't very easy to use, and they were also expensive and made primarily for large organizations. Electronic storage space on servers was also expensive. Since that time, the tools have steadily improved as their costs have declined. Secure cloud storage is a highly competitive market, and therefore, there are many solutions available at a reasonable cost. As a result, the benefits of paper reduction now far outweigh the costs of implementing such a system.

The methodologies outlined in this program combines distraction management skills, digital information strategies, with proven time management techniques utilizing technology tools for professionals in a practical and simple way. Many time management experts shy away from technology. I firmly believe this is a huge mistake. We must find a balance! Reverting to paper in today's modern world is a cop-out, especially in the age of technology and smartphones.

CHAPTER 1

DISTRACTION MANAGEMENT

PARDON THE INTERRUPTION

In an eight-hour workday, if we receive 100 emails, that equates to receiving one email every 4.8 minutes. Combine that with instant messages, phone calls, and email curiosity breaks, and that equates to an interruption about every 2–3 minutes! Sound familiar? Let's assess your situation.

Self-Assessment

Take the following quick survey (analyze your daily average). How many of the following do you receive on a daily basis?

- Emails: _____
- Instant messages: _____
- Phone calls: _____
- Internet curiosity breaks: _____
- Total Interruptions: _____
- Divide your total into 480:_____
  (interruption every this many minutes) _____

  Other important questions:

- Identify the people (generally) you must respond to immediately. __
- Identify the people (generally) you must respond to within 2 hours.
- Identify the people (generally) you can respond to by the end of the day. ___
- Identify the people (generally) you can respond to within 1-2 days. _
- Do you and your team members give each other some uninterrupted time? _
- Has technology simplified your life? _____
- Do you feel technology is controlling you? _____
  _____

Information Overload—Distractions and the Cost of Task-Switching

150 emails, 50 instant messages, 20 telephone calls, 15 walk-in interruptions, 25 social media notifications, 50 email or internet curiosity breaks—that totals 310 digital interruptions. Divide that into 480 workday minutes and that is an interruption every 1.55 minutes.

Most studies indicate that the average professional is interrupted every 2–3 minutes. Now let's look specifically at just internal interruptions. The average worker checks Facebook 21 times per day, takes 74 email curiosity breaks, and switches tasks on a computer 564 times a day. With these numbers of external and internal interruptions, it is incredible that we get any deep level project work accomplished.

In a 2007 Microsoft study, researchers concluded that it takes 15-minutes to return to the work that computer programmers were performing at the time of an electronic-based interruption. If we get interrupted every 2–3 minutes and it takes 15 minutes to return to the work we were performing, how do we get anything done during the day? To make matters worse, most post-2015 studies indicate that it now takes 23 minutes to return to the task that we were performing before an interruption, and 40% never return to that task after dealing with the interruption. This is why we look at our timesheets somedays at 5 pm and see only 2 hours of billable time but it feels like we put in a 14-hour day.

Attention Deficit Trait

The reality is that we live in an age of information overload. We are constantly connected to the world and inundated with information. We sleep with our smartphones, we are surrounded by 24-hour news networks, add in social media and tablet computers—we can't escape. This is why very smart people underperform. Do you ever wonder why your head is in a constant cloud and you are unable to focus? It is called Attention Deficit Trait (ADT) and it is a world-wide epidemic.

ADT is a relative to Attention Deficit Disorder (ADD), but it is very different in that ADD has a genetic component; ADT does not. ADT is environmentally induced, and in today's age of information overload, those environmental factors are technology-based. In other words, ADT is a condition that is in large part caused by technology and the connectivity that we love so much. Yes, the very technology that we love so much is causing us to walk around like zombies. The scary part is that no one knows the long-term effects of information overload. However, some studies suggest that the problem is getting worse.

What can we do about it? We need to rethink and realign the way that our lives intersect with technology. Listen, I love technology. It is my life and passion, but sometimes it is frustrating, especially when it has a negative impact on productivity and my personal life. We combat ADT and overcome our inability to focus by attacking ADT on four fronts:

1. Enhancing our personal health,
2. Building our workplace health,
3. Learning a time, task, and email methodology, and
4. Acquiring attention and distraction management skills.

Personal Health

Personal health includes both physical and mental health. I am not an expert on this topic, and it is not the focus of this program, but it is important enough to mention when discussing gaining control over your workday. Physical and mental health are very important to every aspect of life. Physically, we know that when we are fit, well-rested, and healthy, we feel like we can conquer anything. When we overeat and when we are sleep-deprived, every situation seems to be doomed for failure. As an example, we know that when we eat a heavy meal for lunch, it is difficult to stay awake

and concentrate for the rest of the afternoon. From a mental health perspective, we also know how difficult it is to concentrate and be productive when we are depressed or anxious, or when we are focusing on a personal problem from which we are suffering. We can't ignore the importance of our physical and mental health on our work life. If these areas need improvement, work with professionals as needed to get your physical and mental health on track. There are hundreds of reputable fitness trainers online who can help you get on a regular exercise program, as well as hundreds of licensed online therapists or life coaches to help you work through issues. We all have our issues. Seeking outside help can be a real game-changer.

Workplace or Organizational Health

Organizational health is also very important. Again, I am not an expert on this topic, but it does have an impact on one's performance. We know how difficult it is sometimes to focus in an environment that is negative or unhealthy. We know how difficult it is to operate in an environment full of drama and distrust. As such, we need to examine ways to improve workplace health. I am not a subject matter expert on this, but a great starting point that I recommend is *Five Dysfunctions of a Team* by Patrick Lencioni and *The Infinite Game* by Simon Sinek. Both have multiple books in publication. I would also highly recommend Simon Sinek's talks on organizational health and leadership. Search Simon on YouTube to watch a few of his videos. He is fantastic, and an inspiration.

Learn a Time, Task, and Email Management Methodology

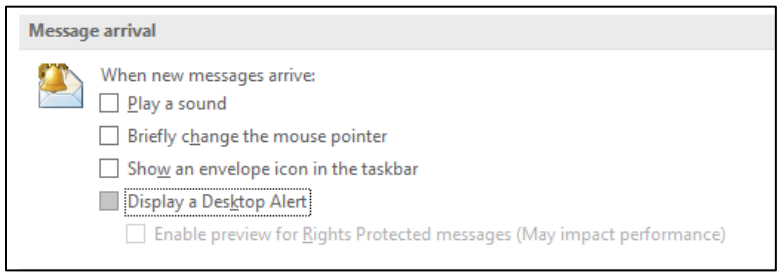
We need an effective way to (1) process the hundreds of digital and human interruptions/tasks that we receive during the course of a day, and (2) organize the tasks, digital information, and paper information that hits our desk. In other words, we need a digital methodology to get organized—and stay organized. If we don't have system in place, we will operate in state of chaos. Studies show that if we do not have an effective task management system to capture our tasks and file away that information, we continue to worry about those things, which has an enormous impact on our ability to focus. I am an advocate of using and customizing tools like Microsoft Outlook and our smartphones to process this information. For those of you in the legal profession handling enormous volumes of documents, I also think that legal document management systems can be extremely helpful to legal professionals. These are tools like Worldox, NetDocuments, or iManage. For other professionals, tools like Microsoft SharePoint, customized for your organization's document management would be invaluable.

Attention Management Strategies

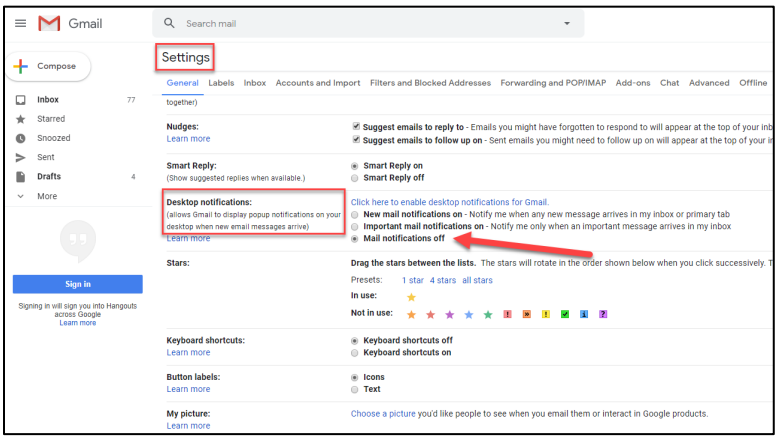
I want to share some essential attention management practices that are easy, practical, and will make an immediate impact on your ability to focus:

Turn Off ALL Digital Notifications.

We all should be aware of the perilous cost of task-switching. Notifications are invitations to task-switch. They are like a dozen little devils sitting on our shoulder, tempting us to do everything except what we are supposed to be doing, and those devils have a direct hotline to our brain. Why would we give the world a hotline to our brain? Turn all notifications off—and I mean ALL of them! In Outlook, email notifications can be turned off by navigating to **File** > **Options** > **Mail** and deselecting the four different methods of notifying you when a new message arrives.



In Gmail, navigate to **Settings** > **Desktop Notifications** and turn mail notifications off.



On an iPhone, go to **Settings** > **Notifications** and go through and turn off notifications by App. On an Android-based phone, go to **Settings** > **Notifications** > **Application Manager**, then turn off notifications by App.

Practice Single Tasking

It is not enough to say that multi-tasking is bad. We need to practice single tasking. We need to clear our desks AND our multiple monitors of information that is not directly relevant to the project that we are executing. For example, you should almost always minimize Outlook on your second monitor while you are working on projects unless you are using that information for the task that you are performing on your main monitor. Why would you leave up on your beautiful 21" screen the single most chaotic distraction known to man in the 21st century—email? That is insane if you think about it. Email fires distraction bombs at us every 30 seconds to 5 minutes. How can we possibly focus if we see those bombs land in our inbox? Just because we have 2 or 3 monitors doesn't mean that we need to have something displayed on them, especially if the information displayed on them derails our ability to focus on the task in front of us.

Pomodoro Technique ®

The Pomodoro Technique is a wonderful and easy technique that utilizes a 25-minute timer to maximize attention for a single task. Pomodoro involves single tasking for 25 minutes and then taking a break and doing something relaxing for 5 minutes. In other words, working in intervals. The human brain functions very well maintaining attention to a single task for 25 minutes. After 25 minutes, we begin to lose focus. By giving ourselves a 5-minute break, we can return to deep-thought work for another 25 minutes very easily.

After you get used to concentrating for 25 minutes, one can adjust the concentration interval to a longer time. Many people are able to work for 40 minutes or longer and take a 10-minute break. I often go 50-minutes now that I have expanded my initial non-existent attention span. The Pomodoro Technique makes a huge impact on productivity and also helps combat procrastination. Think about it, we can endure even the most tedious dreaded task for 25 minutes, right? Once we get a little momentum going and we get immersed in the project, it becomes a lot easier and you don't want to stop.

One important note: I recommend that you do not process emails during your break. Take a real break and do something relaxing, like getting some fresh air or water, or taking a 2-3 minute walk without your phone.

There are many other great time management techniques that are part of the Pomodoro way. To learn more, visit https://francescocirillo.com/
pages/pomodoro-technique.

Tackle Deep-Thought Work Early in the Day (or when rested)

Dive into deep-thought work, like writing projects, early in the morning. There is little question about it—our brains function better following quiet time or sleep. We also know that we can be highly productive while the rest of the world is sleeping because there are far fewer interruptions. This can be one of the most productive times of the day.

Create Rituals

Rituals are short checklists designed to execute the same desired tasks during a set period of time—for example, a morning ritual. Rituals keep us on task. They are extremely helpful because they help us form positive habits and prevent us from getting distracted. As an example, I have a morning administrative ritual from 8 am to 10 am whenever I am in the office (when I am not traveling, speaking, or teaching). I avoid appointments with anyone during that time period unless it is urgent or extremely important. My morning ritual looks something like this:

- ✓ Review my Daily Plan that I created the day before (see below)
- ✓ Eat breakfast at my desk (oatmeal)
- ✓ Take my fish oil, garlic & vitamins
- ✓ 5-minute huddle with my team (as a group, or shorter with individuals)
- ✓ Reach out to one new organization for business development (speaking)
- ✓ Ask a potential client or existing client to grab coffee or virtual coffee via Zoom
- ✓ Review my potential new client report
- ✓ Reach out to past clients without active matters to check in
- ✓ Engage in business social media and send birthday wishes
- ✓ Check in with my leadership team members
- ✓ Check in with my partners

I don't get all these items finished each day, but I certainly do all of them at least twice a week. What I don't get completed today, I pick up where I left off tomorrow.

Rituals also remind us to do things that we frequently forget . . . things that we commit ourselves to do as New Year resolutions or annual goals. By adding rituals and checklists into your life, you can greatly enhance your ability to focus and do those things that seem to always fall off the radar.

Checklists can also be extremely helpful for enhancing our ability to focus. I discovered an awesome app for the iPhone/iPad called Simple Checklist to organize all my daily rituals and checklists. If you have an Android-based device, there is Chore Checklist or Habitica. One can use an app like this for other important checklists, like an Opening File Checklist, Closing File Checklist, Mergers & Acquisitions, Client Interviews, etc. I also use an app like this for personal things like "Winterize House Checklist" (turn off water spickets, clear garden, prep rose bushes, clean gutters, bring in ceramic pots, etc.) or "Monthly Home Tasks" (dog's heartworm, replace furnace filter, replace water filter, refrigerator filter, etc.).

Engage in Daily Planning

Daily planning is critical if you want to achieve focus and change your habits. If your current routine doesn't include daily planning, that routine must be broken and reconstructed. The reality is that very few people take the needed 5 to 10 minutes at beginning of the day or the end of the previous day that will save them hours, days, weeks, months, and years of waste and inefficiency. Most people just dive in or "show up." We jump right into email, where we become instantly derailed by fighting little fires instead of creating clear goals or a roadmap for the day. We need to sketch a daily plan, huddle with our team, adjust our daily plan if needed, and then use that daily plan as our roadmap to keep us focused. Without a roadmap, it is incredibly easy to allow distractions to control you. If you don't have a plan, you will quickly become part of someone else's plan.

Many people experience success by planning the next day's roadmap at the end of the day. We know where we left off with tasks and can plan where to begin again the following day. Others successfully engage in daily planning the morning before the day starts, when we are well rested and with a clear mind. If you engage in morning planning, I recommend coming in 10-15 minutes early to do so, before the day's fires have started. It is difficult to focus once the chaos begins, especially without a solid road map for the day.

Engage in Weekly Planning

A once-a-week "get organized" deep dive is essential to successful distraction and time management. This will help you frame realistic daily planning, catch things that "slip between the cracks," and keep you focused on the big picture goals that you want to achieve. It will help you stay driven and will give you the power of creativity and sense of control in your day and in your life. Do you want to move a mountain in your lifetime or just shift piles of dirt aimlessly? Without engaging in a weekly planning habit, you are just shifting around piles of dirt on the same mountainside.

As explained below in the chapter on weekly planning, I recommend this being a very disciplined practice that is rarely ever missed. Schedule everything around it as much as possible. Do it at the same time every week. For me, I do my weekly deep dive on Friday morning before the day starts.

Digital Detox—A Balanced Approach

Many people view digital detox as "going off the grid." While I love the idea of doing that a couple times a year for a few days, it isn't very realistic for many professionals, and it certainly isn't very practical on a day-to-day basis.

A better way of thinking about digital detox is setting healthy boundaries. You want to set boundaries that still give you some freedom and joy, but also set you up for personal and professional success.

Here are some *examples* of healthy boundaries. Adjust the values/times to fit *your* needs.

Screen Scheduling

- No devices after 9 pm
- No email after 7 pm
- Phone-free food
- Phone-free walks
- Phone-free gardening
- I will spend no more than a total of 30 minutes per day on social media
- Social media-free Sundays

Volunteer Work

- I will serve on no more than 1 board at any one time
- I will serve on no more than 1 association committee at any one time
- I will limit non-billable administrative tasks to 10 hours a week
- I will handle 1 new pro bono case every other month

Personal Relationships

While boundaries are usually articulated in the negative (i.e., "I will *not* spend more than 30 minutes a day on social media"), relationship boundaries sound a little better stated the other way around.

- I will have 1 date night per week with my significant other
- I will go running or exercise with my children 2 times per week

Dietary, Exercise, and Health

- I will not eat between the hours of 7 pm and 10 am
- I will eat no more than 250 calories a day of junk food (e.g., chips or sugary food)
- I will limit my animal protein intake to 5% of my total diet
- I will drink no more than 2 caffeinated drinks per day
- I will drink no more than 1 alcoholic drink per day (and I will not accumulate them until the end of the week and drink them all at once).
- I will not get less than 7 hours of sleep every night.
- I will not consume less than 1 gallon of filtered water per day.
- I will not neglect my mental health. I will meditate once a day.

CHAPTER 2

EMAIL MANAGEMENT

THE EMAIL PROBLEM

The typical professional today sends and receives between 100 and 200 messages daily. While we are discovering new ways to communicate via instant messaging and applications like Microsoft Teams, email is still one of the most important technological communication advancements of the past 100 years. It has fundamentally changed the way we communicate and do business.

For some professionals providing services like legal, accounting and consulting, emails present a wide array of issues that most of the business world will never face. In this chapter, we will discuss these issues and teach you how best to deal with them. These issues or problems range from ethical considerations to email overload and time-management. While there is no perfect solution, there are many methods to effectively handle large volumes of email.

The first step to solving any problem is understanding the problems that exist. We must get our arms around all the email issues that we face. The second step is to isolate each problem and tackle each one, without forgetting how that might impact other email problems. For instance, controlling spam email too militantly may prevent you from getting an important email from a client if your spam filter inadvertently catches an email from a client. In other words, when you solve one problem, it may open-up a different can or worms.

METHODOLOGY TO CONQUER EMAIL—YOUR GAME PLAN

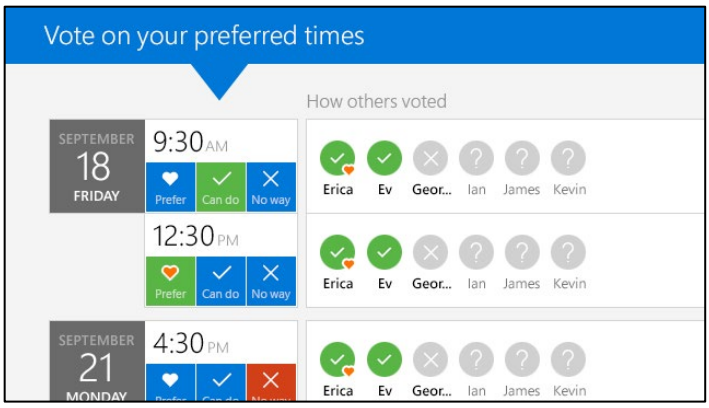
Most people do not have a methodology or a "plan" to process emails. Most people just blindly dive into email at the start of the day. However, developing a plan to process emails can vastly improve your workday efficiency. What follows is a logical game plan or methodology to process your emails. Adjust the items as needed.

Reduce the Number of Emails You Receive

We often focus on how to eat through all our emails, but we fail to think about ways to actually reduce email. Here are some practical ways to significantly reduce the amount of email that you receive.

1. Resolve email instead of kicking the can down the road. When we kick the can down the road, we often cause other problems and end up getting dozens more emails stemming from the original email.

2. Don't create 10 more emails from your response. As one example, when trying to schedule an appointment with someone or multiple people, use applications like Doodle or Microsoft FindTime. I like Microsoft FindTime because it is free with Microsoft 365 and it integrates directly with your calendar and contacts in Outlook. Too many people send an email like this: "How about setting up a meeting next week sometime?" If you sent that email to just 5 people, you are going to get 5-10 emails back with responses everywhere from "Sure" to "I have to take my pet to the vet" to "How about Tuesday at 4, or Wednesday at 3, 4 or 5, or Friday at 8, 9, 3, 3:30. . . ." In other words, it creates a total mess of emails that you have to piece together like a puzzle. It is like herding cats. Instead, send a quick, easy-to-create poll with FindTime or Doodle so that everyone can vote on their preferred times. These apps hold all proposed dates on your calendar as tentative until the poll is closed and you, as the organizer, pick the final time. Then it sends the invitation out to all participants. It makes herding cats as easy as pie and eliminates blowing up everyone's inbox.



3. Be specific, not vague, in your emails, so you don't get 10 more questions. If people don't understand your answer, they are going to email you or others, causing even more email traffic and potential drama. Be clear in your responses. If it is too much to type, consider picking up the phone, or having a Zoom or Microsoft Teams call with video and screen-sharing to offer more clarity to your response.

4. Dial down the number of people that you and people in your office CC, BCC, or send group emails. Copy only the people who need to read the message.

5. Give your staff permission to not say thank you. Getting 30 emails that just say "thanks" will clutter your inbox, increasing the likelihood that an important email gets sandwiched and lost in between all the "thank you" emails.

6. Get a spam filter or fine-tune your existing spam filter.

7. Pick up the phone or get out of your chair and have an in-person conversation rather than sending an email. This will avoid a great deal of misunderstandings that cause drama and a dozen more emails. Have the in-person or phone conversation, and then send the confirming email summarizing the solution.

8. Increase the use of Instant Messaging apps like Microsoft Teams or Slack.

9. Out of Office Notifications. Use them sparingly so people stop emailing you when you are out and avoid potential disasters. Don't overuse them. Don't rudely pepper other people's mailboxes with auto-responses. Finally, don't forget to turn them off when you return!

10. Use Outlook rules to auto-route emails from listservs and other similar senders into special inbox subfolders that you can visit when needed.

Process Emails Faster and More Efficiently with Templates or AutoText Entries

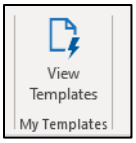
We all have email responses that are formulaic that we have to retype over and over again. Sometimes we spend several minutes looking for a similar email that we drafted recently to another person. Instead of wasting time retyping or looking for that similar email, we need to be able to process these emails more efficiently. We automate the creation of documents using forms, macros, precedents, or templates, so why wouldn't we automate the emails that we frequently draft? Instead of wasting time re-inventing the wheel or looking for older email responses, create an email template or an AutoText entry in Outlook to automate the response.

Email Templates

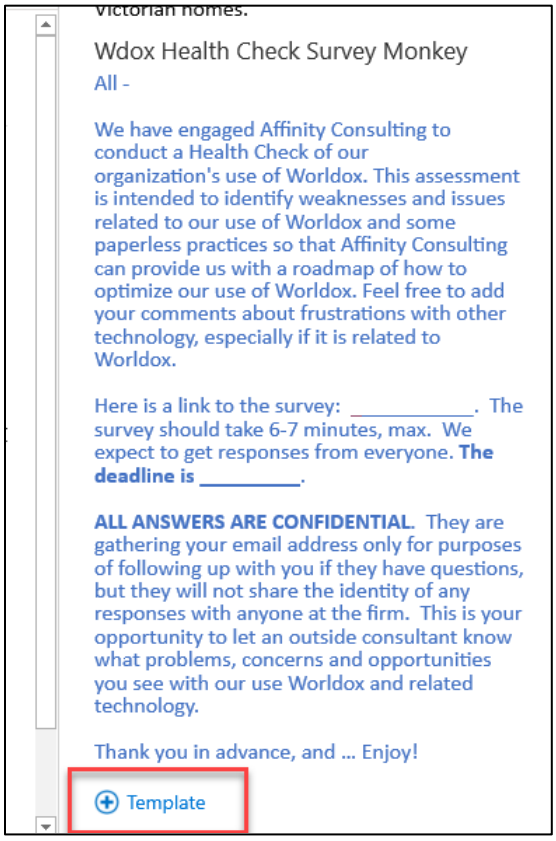
Email Templates are part of Microsoft 365. If you don't have a subscription to Microsoft 365, you will not have this feature available. Instead, use AutoText entries instead (instructions below).

1. Select **New Email** to create a new email.

2. Select **View Templates** from the Message ribbon. If you do not have this option, you need to download Microsoft 365 or update your version of Microsoft 365 for Outlook.



3. To create a new template, select the **+ Template** button located at the bottom of the My Templates pane.



Name your Template, insert the desired text and hit **Save**.

Batch Process Emails

Most professionals need to be more deliberate about when they check emails instead of checking email 70+ times a day or leaving their Outlook inbox maximized all day long. We need to reduce the number of interruptions (email and otherwise) so we can be more focused. After all, how on earth can anyone get anything done with an interruption every 2 to 3 minutes?

Ask yourself the following question: 10 or 20 years ago, would you have let someone walk in your office every 2 to 3 minutes offering to sell you a product or asking you for a favor? Of course, you wouldn't! So, why do you let it happen now with email? Why do you drop everything that you are doing to read and/or respond to an email that just arrived? You have invested thousands of dollars in technology that is supposed to make you more efficient, but instead it has created an interruption hotline to your brain.

Some time management experts suggest checking email twice a day. While this may sound like a good plan to some, it is completely unrealistic for most busy professionals. When email was just becoming popular, there wasn't an expectation that it would be dealt with immediately, so twice a day was probably okay. However, in today's age, checking email only twice a day is unrealistic and potentially irresponsible. Entire companies communicate via email. Email is a way of life and the way everyone communicates. Checking email twice a day isn't enough if you get 100+ emails—it would be overwhelming to sift through that many emails during two sessions. I think checking it throughout the day is more realistic, and just as important, will make it easier for you to prevent your inbox from getting out of control.

One way to handle this is to batch process emails at more planned or deliberate times. Some professionals simply cannot do this, since they live, breathe, and communicate via email instead of face-to-face or phone meetings. However, most professionals can engage in more batch processing at some level. Remember, we are talking about being more deliberate about when to check email instead of checking it 70+ times a day. If you can handle emails at more deliberate times, you could get more project work completed and follow your plan for the day.

Everyone's email batch processing schedule will be different, and it will probably change every day for most people. Some individuals must leave their email maximized on their screen all day or they will be fired! Others can get away with checking email just 2 to 3 times a day. I think most professionals fall somewhere in between those two extremes. It depends on your role and job description within the organization. Whatever the case, take a couple minutes at the beginning of the day to sketch a quick batch processing plan for your day. Here is an example:

Today's Batch Email Processing	
7:30 AM	15 minutes
10:00 AM	30 minutes
12 Noon	90 minutes
4:00 pm	30 minutes
5:00 pm	15 minutes

You will probably not stick to it 100%, but that is okay. Planning to check it 5 times and ending up checking it 7 or 8 times is still much better than checking it 70 times or leaving it maximized all day long on a second monitor. Also remember that every day will be different. Some days you will have no time to batch process emails. Other days, you may have the entire day.

Touch the Email One Time + 3-Minute Rule

Experts tell us it takes on average, 2-3 minutes to read and digest an email. Then we are forced to make a decision. What are you going to do with this email? Before you skip an email, or for that matter, any bit of information that comes across your desk (paper or digital), always stop and ask yourself, "What do I have to do to touch this just one time?" If you delay resolving it or acting on it, you are kicking the can down the road, and you are going to waste another 2-3 minutes the next time that you touch it. As such, always try to touch every email only once!

Delete, Do, Delegate, and Delay

When processing or attacking your email, and following the 3-minute rule, what should you do with the email after you initially review it? Here are your options: The 4 Ds. This is a slightly modified technique that I learned nearly two-decades ago from David Allen in his life-changing book *Getting Things Done*®. I have modified it to better fit the needs of professionals like attorneys, accountants, consultants, etc. who receive not just more email, but also more substantive and longer emails.

DELETE

DO

DELEGATE

DELAY

Remember, any email that can be responded to or dealt with within 3 minutes (saved in a client file, forwarded, deleted, etc.) should be dealt with immediately—the first time you lay eyes on it. This rule is based on the premise that the second time you have to deal with the email, it will again take you another 3 minutes to navigate to it, open it, read it, comprehend it, re-familiarize yourself with the topic and then handle it. So, why not just respond to it or delegate it immediately instead of wasting another 3 minutes at a later date? Stop procrastinating and re-wasting that 3 minutes over and over.

My 3-minute rule is a slight modification of David Allen's *Getting Things Done*® 2-minute rule in 2 important ways:

1. Most emails concerning matters in the legal community and many other professions take longer than 2 minutes, so I increased response time to 3-minutes. If you sell widgets, 1 or 2 minutes may be all you need to process most emails.

2. It usually takes much longer than 2 minutes to read and respond to emails in the legal world. Often, lawyers and other professionals research and carefully craft a response from well-chosen words. It could take 30 minutes, 2 hours, or even days! The critical question to ask is if you have time to resolve the email in the time that you have allocated to batch process, then you should just resolve it. For example, let's say you have 1 hour allocated to batch process emails, and you encounter one email that will take 30 minutes to read and resolve. In that case, you should probably do it, especially if it is an urgent or a high priority. If it is going to take close to an hour or longer, then you may delay it. If you delay it, you are going to process the email by following the procedure below about how to properly delay and get the email out of your inbox. Remember the key to the 3-minute rule is that you avoid or minimize having to process an email more than once.

Delete

Delete whatever you can immediately. Learn how to use the DELETE key.

That should be the first thing that you do before you start dealing with email, just like *not* bringing junk mail and annoying advertisements into your home. It is easier to work from shorter lists than long list, so if you can get your list of unread emails from 20 down to 12, do it! Skim your inbox and **delete** the following:

- All the spam email that gets past your spam filter.

- Interoffice spam that is irrelevant to you.

- CCs that you don't need to save.

- Annoying jokes from friends and coworkers.
- Email from people you don't like (unless it's important, of course).

Do—Just Resolve it!

This is easy to explain, but hard to execute. If you can answer the question, make the decision, provide the solution, and bring it to a resolution, then just do it! Do not forget that you *may* be able to deal with it more quickly by picking up the phone or walking around the corner and talking with someone. Remember, an email oftentimes invites another email.

The problem with DO is that you must be organized in order to "do the do." In other words, if you are disorganized and can't find the answer to a question, then you will never be able to efficiently "do the do!" If you struggle with organizing digital information, I recommend my digital book *Fight the Paper* (2019), available at pauljunger.com.

Finally, if it is an email that is going to take a while, you have to exercise discretion about resolving it now or delaying. If you have time within your allotted batch process period, then go ahead and do it. If not, think about disposing of it in under 3 minutes by Delaying (below). Add it to your task list and calendar *then* move/save the email into the appropriate client/matter file.

Delegate

Much of the email that we receive today should be delegated to someone else, or we need an answer from someone else before we can respond.

If someone else should be handling the task or issue in the email, hand it off appropriately. Don't let someone else put "the monkey" back on you, in the words of *The One Minute Manager Meets the Monkey* by Kenneth Blanchard. You can make these emails and tasks easy to track by setting up a Follow-Up Items Outlook rule described below or use a Quickstep. Be sure that you have a system in place to follow-up on everything that you delegate so you can hold people accountable and the tasks you have delegated get done.

If you delegate or forward an email to someone, or ask for an answer from someone else so you can respond, do you have a system in place to track so you can follow-up on the issue without leaving the email in your inbox? Do people neglect to respond to you on delegated items? Do you sometimes find yourself trying to figure out when and to whom you delegated an item? If so, you may be responsible for enabling this behavior because you do not have a system in place to hold people accountable for tasks that you have delegated. Have you become that "push-over" that everyone ignores and your emails land in world of Neverland?

Here is a rock-solid technology solution that will help you with delegated items or follow-up items that originate from an email.

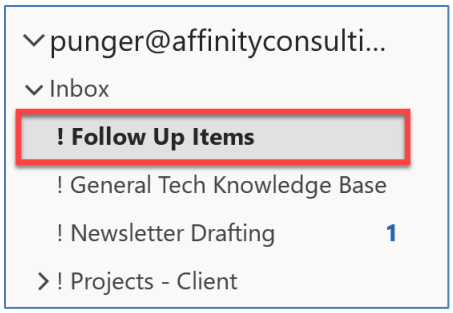
Follow-Up Items Rule

We delegate tasks to folks via email all day. We also ask people for information, but have a difficult time remembering to follow up on those items, resulting in things slipping between the cracks. One way to track those items is by creating an Outlook Rule to "capture" all those items that you are expecting others to do for you. Here is an Outlook Rule that will help.

This Rule looks for emails where you are the sender and where you copied yourself. It will automatically route those specific emails into a special folder called Follow-Up Items, so you have a dedicated folder with only delegated or follow-up tasks that you can review once a day. When I review those items, I usually forward those emails to people and politely ask them to update me on the status.

Here are the steps.

1. First, create a folder in Outlook called something like "!Follow-Up Items". Use an exclamation mark at the beginning of the name so it sorts alphabetically and displays at the top of your inbox subfolder list:



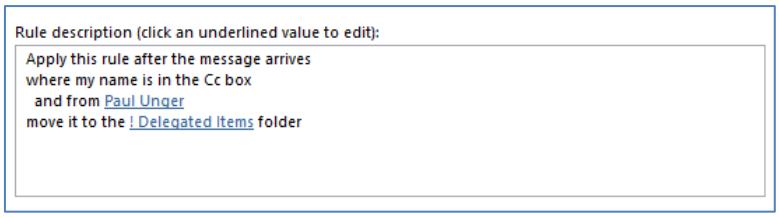
2. In Outlook, click on the **File** menu > **Manage Rules and Alerts** > **New Rule** button.

3. Choose **Apply rule on messages I receive** (that translates to "Apply this rule after the message arrives") and click **Next** at the bottom of the dialog.

4. Under **Select Conditions**, check BOTH **from people or public group** and **where my name is in the CC box**. At the bottom of the dialog, click the hyperlink for "people or public group" and add your email address. This basically creates a rule that will look for emails from you that are also copied to yourself. Click **Next**.

5. Under "Select Actions . . . What do you want to do with the message," choose **move it to the specified folder**. Select the folder that you created called "!Follow-Up Items." If you didn't create the folder yet, you can do it also at this stage. Click **Next** and add any exceptions (probably none). Click **Next**, and name it (something like "Follow-Up Items"), then click **Finish**.

Your final Rule should look something like this:



Visit your Follow-up Items folder regularly. I recommend once a day. Open the items and determine if they have been resolved. If they have not been resolved, forward the email to the person who owes you the information or task and ask for the status: "Hi _____, what is the status of the attached? Please advise. Thanks!"

Delay—If Necessary

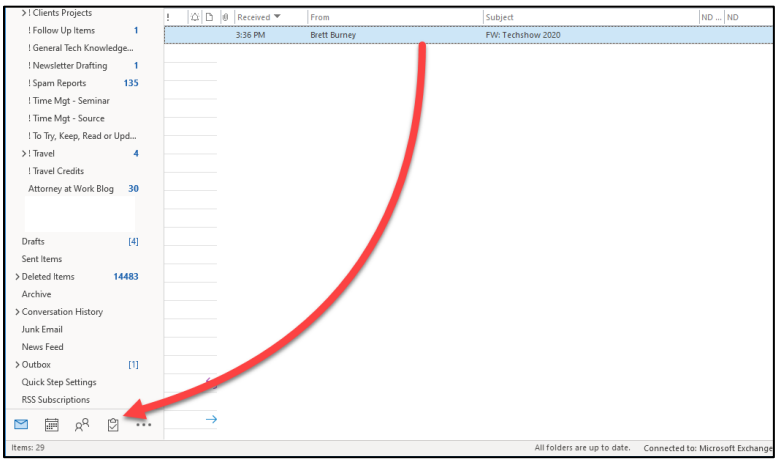
Oftentimes, we need delay a resolution until we have more time to research a topic or draft a longer mail. When we must delay, we should create a task, file the email in the appropriate matter or project folder, and then delete it from our inbox. If left in the inbox, it is likely to get buried by the avalanche of daily emails, and then forgotten until it is too late. We should not use our inbox as a task list.

Delayed emails generally fall into two categories: (1) a very temporary delay (meaning you can get to it in under a day); and (2) a delay of over a day or two. If the email requires only a very temporary delay, then just leave it in your inbox and process it later that day or the next morning. If the delay will be over a day or two, process it as follows.

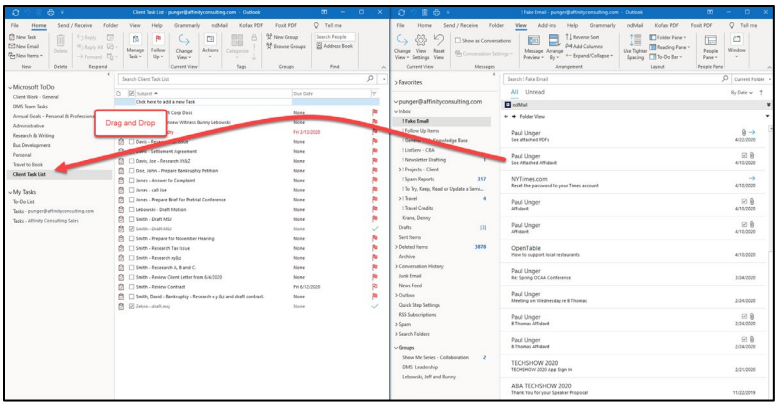
As stated above in the 3-minute rule, if it is an email that is going to take a while to get to or complete, you should simply dispose of it in under 3-minutes by adding it to your task list and then saving it into the appropriate matter file. Stop using your Outlook inbox as a Task List! Instead, do the following:

1. Create a Task from the Email:

Drag and drop the email on to the task module in Outlook. This will convert the email to a task. This function acts as a copy and will leave the email in the inbox for you to take further action, like create a calendar deadline or file it away.



If you have multiple task lists/folders, I recommend that you open your email on one monitor and your tasks on the other monitor, and simply drag and drop emails into the desired task list. Remember, this converts a copy of the email to a task, leaving the original email in your inbox to either file away or delete.



Other Guidelines on Delaying:

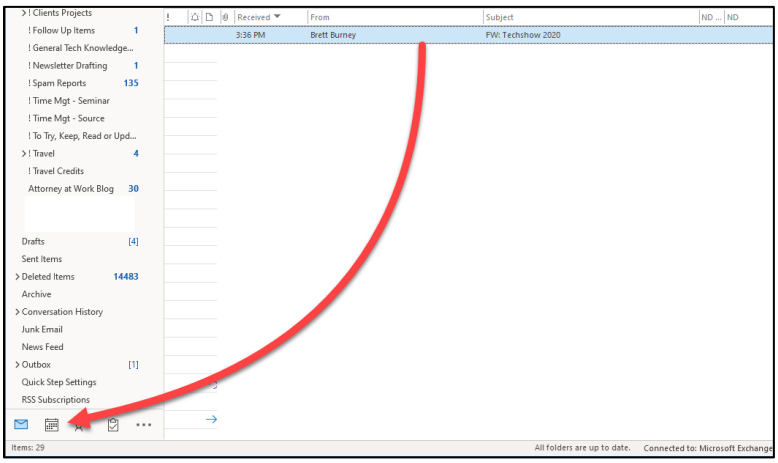
- If you still keep a paper-based task list (I hope not), simply write down the task associated with the email, and then save the email in the appropriate matter or project folder. If the appropriate place is still a paper file, print the email and place it in the paper file.

- In some circumstances, it is okay to set up subfolders under your inbox and place important emails there if you want to access them from your smartphone. For instance, if absolutely no one will ever need a copy of that email because you are a solo practitioner or business owner. Another example is when you want a copy of the email from your smartphone, and there is no other easy way to get it. If you save emails locally using this method, it is critical that you have a backup of your email data.

- If you only receive 10 to 20 emails a day, and you process your inbox down to zero (or close) every day, then it is probably okay to use your inbox as a task list. However, eventually, you will probably outgrow this, as your workload and email volume increases.

2. Record the Deadline on your Calendar:

After you have created a task, drag and drop the email onto the calendar module in Outlook. This will convert the email to an appointment. Again, this acts as a copy function and will leave the original email in the inbox for you to perform the next steps defined below.



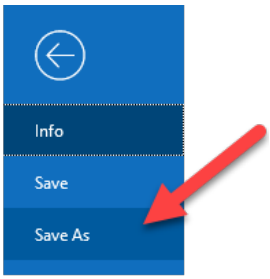
3. Schedule Time to Do It on your Calendar (Time Blocking):

Drag and drop the same email on the calendar one more time to create the appointment with yourself to do the work. If the response requires research and a block of time, schedule the time to do it. In other words, make an appointment with yourself. If you do not do this, you may find yourself up at 11 pm the night before it is due.

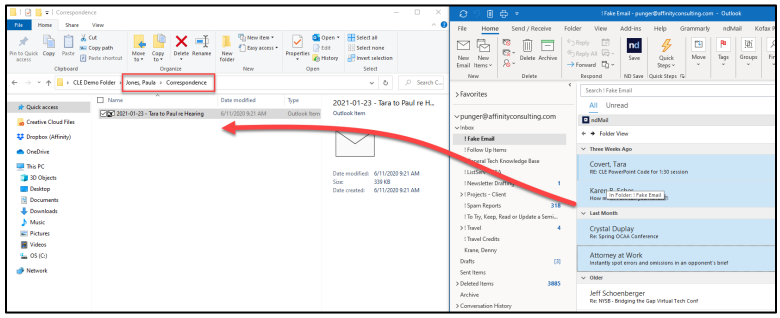
4. File/Move the Email from the Inbox:

File the email and delete it from your inbox. If your team needs access to the email, save it in a place where they can get to it. The correct place for this is within the digital matter or project folder located on your network in a Windows folder or in your electronic document management system. There are multiple ways of doing this, depending on the software that you have:

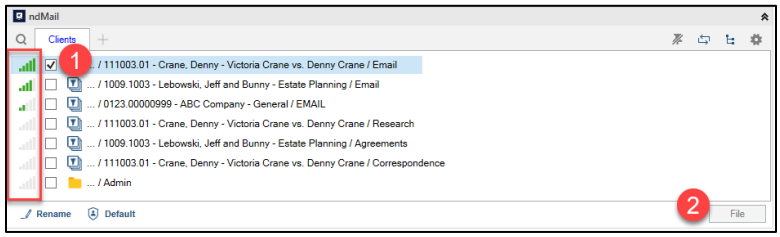
a. **I only have Outlook.** If you only have Outlook, open the email, and select **File** > **Save As**. Save the email like you would save a Word document or PDF. For instance, save it into the correspondence folder and utilize the naming scheme YYYY-MM-DD - Long Name Description.



b. **I only have Outlook, but I have dozens to move all at once.** In this case, open the desired folder through Windows Explorer on one monitor, and open your Outlook email list on another monitor. Next, select all the desired multiple emails and drag & drop them in bulk into the desired folder. Note that you may have to rename them because they will adopt the text in the Subject line as the file name. Alternatively, if you don't have a document management system or practice management system to extract these emails, there are some decent programs like SimplyFile / MessageSave by Tech Hit (www.techhit.com/messagesave) that can help you save emails out of your inbox and into shared folders on your network.



c. **I have a document management system like Worldox, NetDocuments or iManage, or a practice management system like Clio, Centerbase, PracticeMaster, etc.** If you have one of these systems, there are add-ins for Outlook that make it very easy to save emails. Below is a screen shot from NetDocuments (www.netdocuments.com), which demonstrates the simplicity of saving an email into a matter or project folder outside of your inbox. To save an email, simply select it and then select the desired matter from their prediction panel powered with AI/machine learning. This type of solution, by far, is the best and most ideal method for organizations that depend on heavy volumes of email. Many programs like these also offer "conversation thread filing" which can automatically save subsequent emails in the same thread to the matter.



Summary

In summary, remember to try to process emails at more deliberate times, and touch the email only one time. What should you do with it? The 4 Ds—Delete, Do, Delegate, or Delay.

Remember the endgame. Ideally, you want to get the email out of your inbox so that (1) your inbox is "getting to zero"(or close to zero) on a daily basis; (2) any tasks and deadlines get recorded in your task list and calendar; (3) you have scheduled time to perform that task; and finally, (4) you are saving the email into the case/matter file where everyone on your team or in your office has access to it.

CHAPTER 3

TASKS—THE RIGHT TOOL TO MANAGE TASKS

PAPER OR SOFTWARE?

It is critical that you have a tool to track tasks. To *not* have a tool is the biggest mistake. The human brain is incapable of memorizing so many tasks in today's age of information overload. It is best to use our brain on more important things like reading, writing, and analysis than to memorize hundreds of tasks and their deadlines.

I would rather someone have a paper task list than no task list at all. That said, I prefer the use of software for at least the Master Task List. Remember—keep things simple. I recommend the following:

1. A software-based task list for your Master Task List (*i.e.*, Microsoft ToDo, Outook, Gmail Tasks, Clio Tasks, etc.). Your Master Task List will likely store hundreds of tasks/items;

2. Paper for your daily road map/daily list of tasks. This list will have only 3 to 5 things and is kept next to your keyboard.

Why Digital Task Lists Failed You in the Past

Many people have tried using Outlook tasks in the past and failed miserably. There are two primary reasons for this. First, the interface for Outlook tasks is horrible. It is still horrible, to be honest. It looks like a cockpit of a 747. It just doesn't resonate with people. In large part, Outlook tasks have looked as ugly as they do now since Outlook became widely available in the early 1990s! Second, if you were out of the office and needed to create a task, it was impossible to create the task without going back to the office. As a result, tasks would instead get written down on sticky notes and napkins. Today, that problem is solved because we can now enter tasks directly on our smartphones, or simply tell Siri, Alexa, or Google (our virtual assistants) to create the task.

If Outlook or another digital task list failed you in the past, you need to give it another try because technology has improved immensely.

Why Software is Better than Paper for Your Master Task List

Keep in mind, that I do advocate the use of paper for **daily planning** (see below). That is primarily because (1) we need our computer monitors to display other important information, and (2) daily planning is extremely focused and contains a very short list of tasks (usually 3 to 5 items). We are always more focused on a daily basis when we operate from shorter lists. However, since the Master Task List usually contains 100+ items, software is definitely a better tool for the master task list.

Why software is better than paper for the master task list:

1. **One Centralized List**. With software, you have one centralized list, probably stored in the cloud and accessible from multiple devices.

2. **No Re-Writing.** With paper, you constantly have to re-write your lists. When you have 100+ items, that is a waste of time and opens the door for human error.

3. **Shareability and Collaboration.** Tasks maintained within software are sharable with internal and external users. One can have a project and assign tasks to multiple people. Best of all, you can track when those tasks are completed.

4. **Automatic digital reminders/notifications.** Software reminds you when tasks are due and will alert you ahead of time so you can plan to get them completed.

5. **Subtasks.** With software, you have the ability to create subtasks under a main task and track progress.

6. **Backup in Multiple Locations.** Software-based task lists provide data backup up in multiple locations, making tasks extremely difficult to lose, unlike a piece of paper.

7. **Capture and View from Any Device.** With software, you can enter tasks and view them from all your devices (computer, tablet, smartphone).

8. **Sortable Lists.** Software gives you the ability to sort your task list based on the due date, or the description, or the priority, etc. You can't sort anything on paper.

9. **Filterable Lists.** With a click of a button, software gives you the ability to display just the tasks assigned to me, or just the tasks due this week, etc. You can't filter anything on paper.

10. **Synchronization/Integration with other Programs.** Software typically provides the ability to synchronize between Outlook/smartphone/practice management software or contact management software, so all lists are synchronized and up-to-date in all programs and devices.

Outlook Tasks and Microsoft ToDo

The process of task management must be convenient and simple. Outlook isn't perfect. In fact, it is kind of ugly, but it works well with my rules because of its convenience, ease, versatility, and ability to integrate with smartphones. If you cannot easily capture and record a random neural firing, thought, or task quickly and in a central location, that task will either be lost or quickly forgotten. Outlook, along with your smartphone, is a viable solution. Before smartphones, maintaining a task list in Outlook was nearly impossible because you cannot carry your desktop computer around and you cannot wait 5 minutes for a laptop to boot up and start Outlook in order for you to record the task. Smartphones and tablets are instantly available. You can use Siri on an iPhone or iPad or voice commands on an Android device to create the reminder or task. There is no boot-up process. In fact, often times, it is faster than writing it on a random piece of paper. It is certainly better to record it on the smartphone because it can be instantly organized and, even more importantly, instantly backed up, thus far less likely to be lost like a piece of paper, sticky note, or a napkin.

Microsoft ToDo is a relatively new application that Microsoft developed after purchasing a wildly popular task list called Wunderlist. Microsoft finally sunset Wunderlist in 2020, forcing everyone into Microsoft ToDo. Based on everything that I have seen, Microsoft seems to have big plans for ToDo. In fact, if you log into Microsoft 365 today within your browser and open Tasks in Outlook, it is actually the Microsoft ToDo interface—not Outlook. That is great news.

The beauty behind all this is that Outlook synchronizes seamlessly with Microsoft ToDo. If you create a task in one, it shows up in the other instantly as long as you have Microsoft 365 with hosted Exchange (as most organizations do these days). If you don't have Microsoft 365 with hosted Exchange, I would recommend that you simply use Microsoft ToDo without Outlook, or Outlook (or another reliable tool) by itself.

Task Folders

I strongly recommend creating a small handful of necessary task folders (lists) to organize your tasks. Recall, we always focus and operate better from short lists. As indicated above regarding the process, I generally recommend four core task lists if you are an attorney in a law firm, an accountant serving clients from the general public, or someone in a similar profession. Create these four task folders (lists) in whatever system you are using:

1. Client—General

2. Administrative

3. Business Development

4. Home/Personal

For an attorney in a legal corporate department or college/university, or similar profession providing professional services, I usually recommend the following if you don't have to worry about business development:

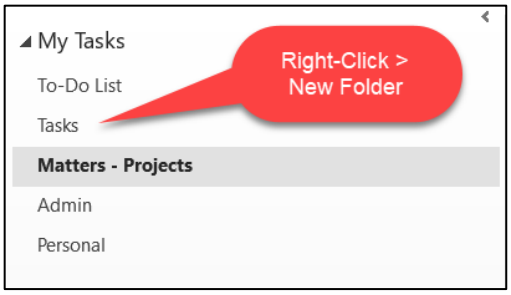
1. General Legal Work

2. Administrative

3. Research and Writing

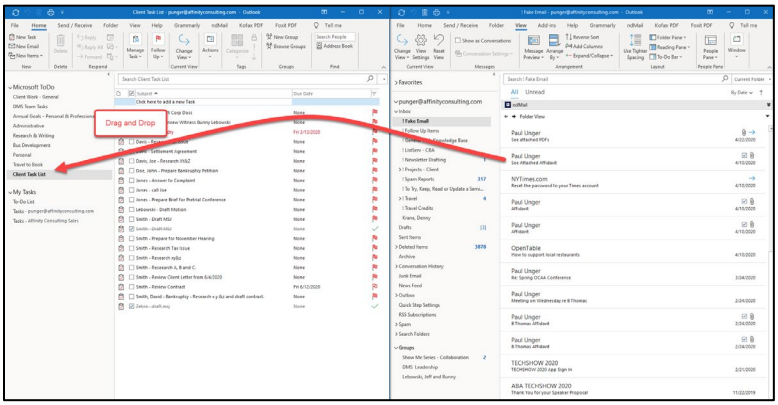
4. Home/Personal (although, you may want to manage a personal list in a separate personal system because of FOIA requests or computer corporate acceptable use policies)

To create a new Task Folder in Outlook, right click on **Tasks** and select **New Folder**.



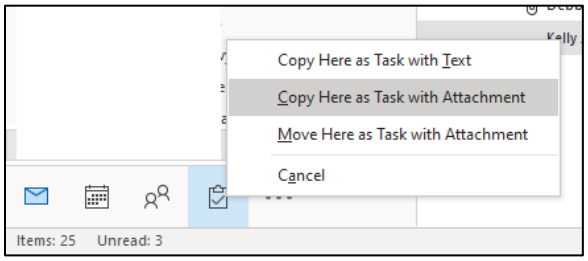
My recommendation to most people providing professional client services is to use Microsoft ToDo as the main task management tool, unless your organization has invested in a more specific software application. You should continue to use Outlook if you like to convert emails into Tasks. Recall they synchronize, so if you create a task in Outlook, it shows up immediately in ToDo. Also remember that a key part of email management is to stop using your inbox as a task list. Many emails remain in inboxes for the simple reason that they are really tasks. You must be able to convert them to tasks easily.

Recall also that within Outlook you can easily convert emails to tasks by simply dragging an email on to the task button. This is an important function.



Additionally, if the email has attachments, you can right click then drag and drop on to the task button or task folder. When you right click, drag and drop, the attachments are embedded within the task, making it very convenient

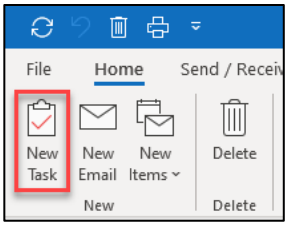
to start working on a particular document, or having all the reference material that you need at your fingertips in order to execute the task.



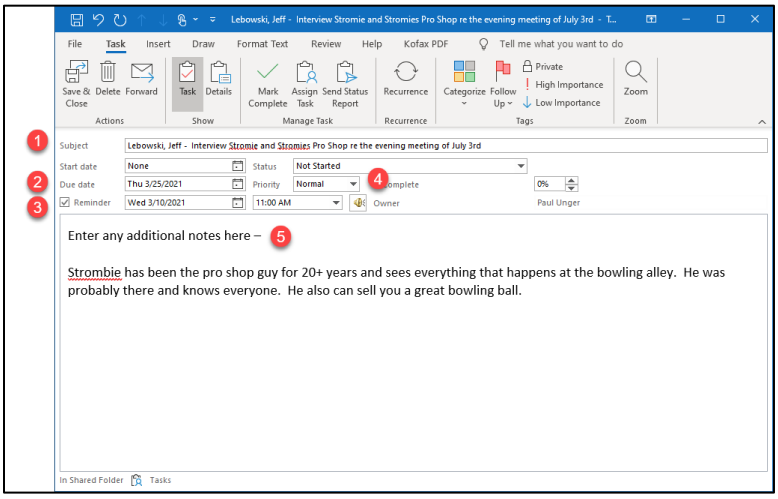
Once Microsoft creates an add-in to convert Outlook emails to a Microsoft ToDo task list item (which Wunderlist could do back in the day when it was widely used and available), then there will be no need to continue to use the older Outlook Task interface. As indicated previously, Microsoft knows how ugly and underutilized the Outlook task module is and will likely replace it completely with Microsoft ToDo. Hopefully, they will do this sooner rather than later.

Creating a Task in Outlook

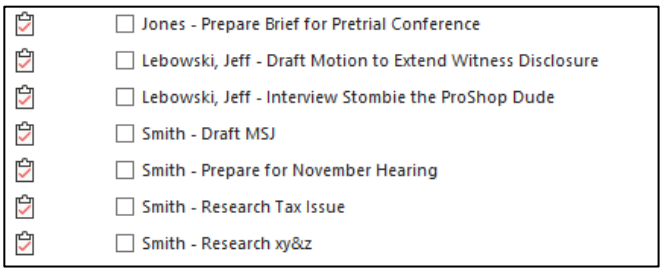
Click on the desired task list, and then, to create a task within that list, click the **New Task** button in the upper left-hand corner, or drag and drop an email on to the task button or a specific task folder.



A New Task form will appear:



1. Enter the Subject starting with the name of the client/matter, followed by a description of the action item. By using the matter name at the beginning, you can group all tasks for that matter together when you sort the subject alphabetically, as seen here:



2. (Optional) Enter a **Due Date** so that you can optionally view tasks with due dates and view those tasks in different colors.

3. (Optional) Add a **Reminder** if you so desire. I find these to be helpful for higher priority items.

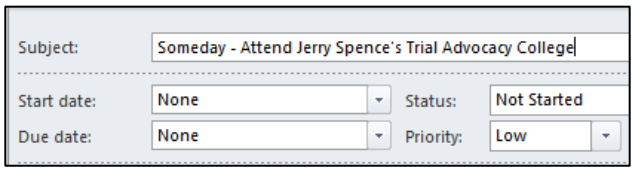
4. (Optional) Set a **Priority** (High, Normal, Low). Not everything is a high priority, despite your feeling of being overwhelmed. Should you believe everything is urgent, then pretend you are categorizing the level of urgency. As a result, your day will consist of the following:

a. High = Urgent

b. Normal = Less Urgent

c. Low = Even Less Urgent

d. Someday Items = These are items that are more akin to New Year's resolutions, goals, or bucket list items. Add "Someday" to the beginning of the Subject line so they can be grouped together when sorted:

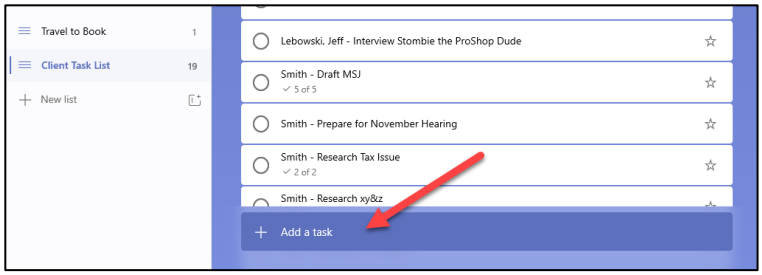


5. Enter any **Notes** in this area that you may find helpful or if you do not have enough room for a detailed description in the subject line.

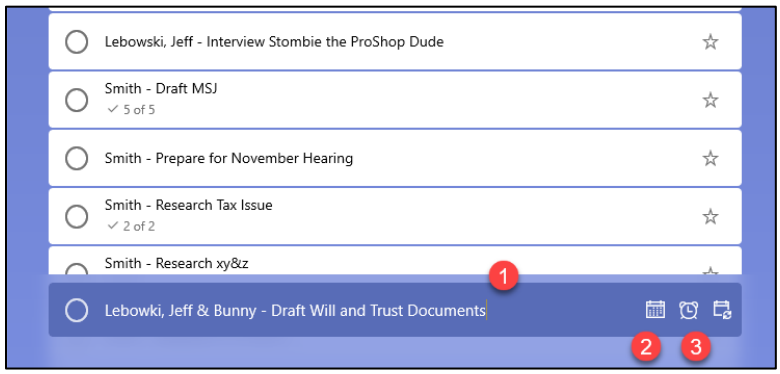
e. Use the Notes section in Outlook to add subtasks or steps to complete the task. Unfortunately, these are not separate trackable tasks, so most people turn on the bullet or numbered list and start typing the subtasks. When complete, you can use the strikethrough font to indicate they have been completed. Microsoft ToDo actually has real subtasks, yet another reason to use ToDo rather than Outlook.

Creating a Task in Microsoft ToDo

Click on the desired task list, and then start typing in the **+ Add a task** field located at the bottom of that list.



Complete the information needed to create the task:

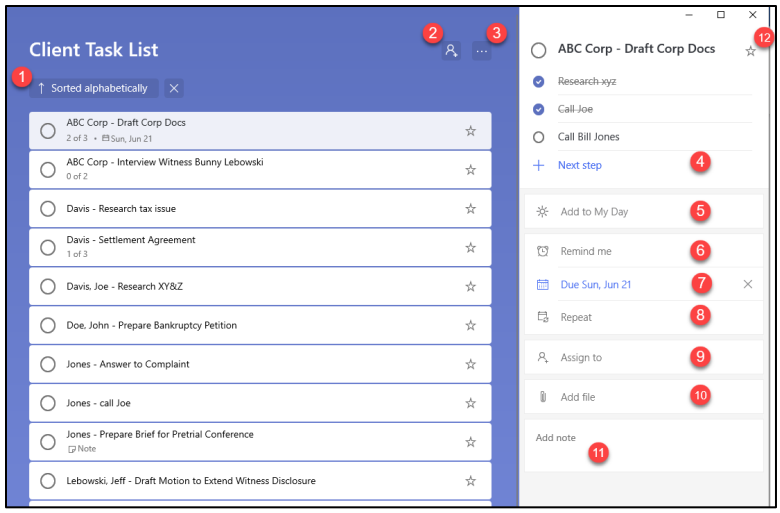


1. Enter description of the task. Just like with Outlook (or any digital task list), use the same naming scheme described above: **Client/Matter Name - hyphen - good description of next step**.

2. Add a Due Date, if desired.

3. Add a Reminder, if desired.

There are many other excellent features of Microsoft ToDo that are incredibly easy and intuitive.



1. Sorting order for your list (by importance, due date, my day, alphabetically, creation date).

2. Share your list with internal or external users.

3. Print, email list, pin to start, delete list, or change sort order.

4. Set up steps or subtasks.

5. Add task to My Day, which is a way to create a daily task list from items already in your Master Task List.

6. Add or change reminder, if desired.

7. Add or change due date, if desired.

8. Designate if the task is a repeating task.

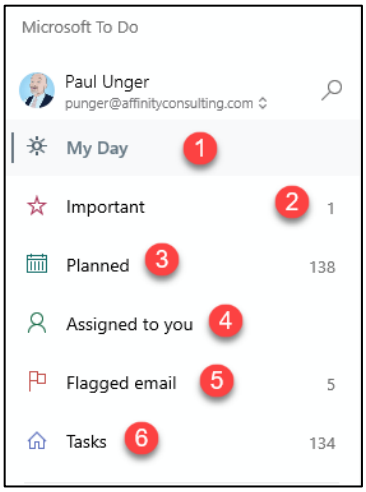
9. Assign the task to another person and still track it on your list.

10. Add documents/attachments.

11. Add any desired notes.

12. Tag a task as Important.

To access your lists and filtered lists, select the desired option along the left-hand side:



1. **My Day** is your daily task list if you want to use ToDo to create a daily task list.

2. **Important** is a filtered list that just shows tasks that you tagged as important (the star tag).

3. **Planned** will display those items with due dates.

4. **Assigned to You** will display any tasks that have been assigned to you.

5. **Flagged email** displays any email you have flagged.

6. **Tasks** show all tasks from all task lists in a combined listing.

Task Management—Daily Planning

Now that you have converted emails to tasks and you also have done your "Gathering and Get Organized" session to populate your Master Task List, you are ready to start executing—getting stuff done! For this, you need a game plan. That game plan consists of daily planning (a 5-minute commitment), which is covered in this chapter, and weekly planning, which is covered in the next chapter.

Recall, we always operate and focus better when working from shorter lists. You will always perform better *on a daily basis* if you have a list of 5 things vs. 100 things.

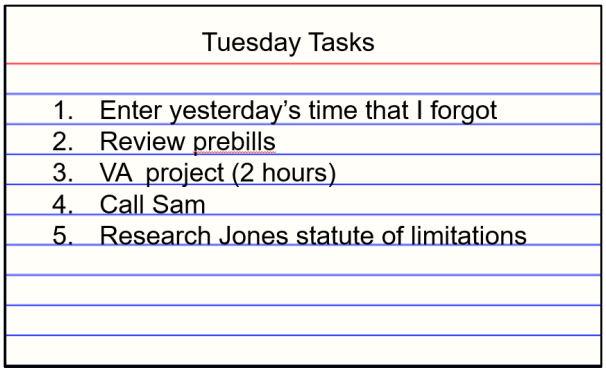
How to Create Your Daily Plan

As a lawyer and consultant who has been paperless for 20+ years, as much as I love technology, I am not ashamed to say that I am a big fan of using paper for daily planning. Take simple index cards as one example. A pack of 100 index cards will cost you less than $3. Use one card per day, writing 3 to 5 tasks that you want to accomplish that day. Another way of articulating this is "Today will be a success if I complete these 3 to 5 tasks." It is okay to re-write items

that are on your calendar, and if you get those 3 to 5 things completed, get another card out and write down 3 more tasks.

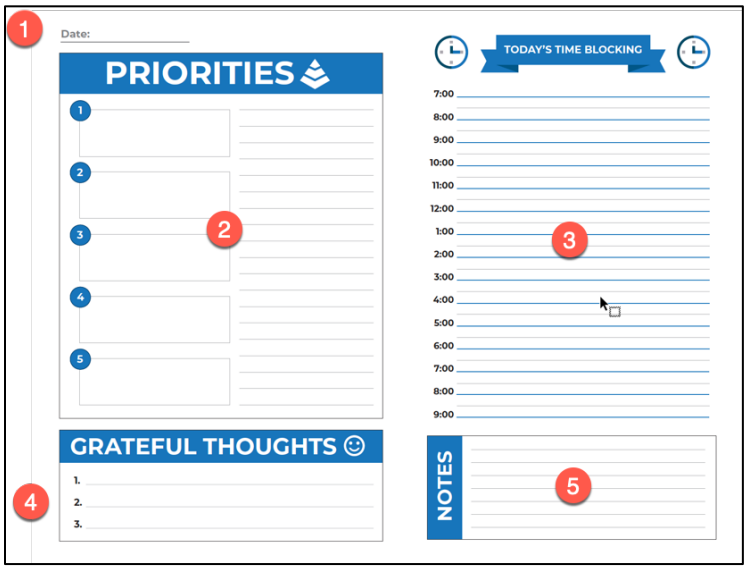
The Simple Index Card

Simply identify and write 3 to 5 things that you want to focus on and complete.



Tame the Digital Chaos Daily Planning Journal

My favorite option for daily planning is a paper-based planning journal. Again, like index cards, you will keep the plan open and visible all day, probably near your keyboard. Here is an example of my TDC (Tame the Digital Chaos) Daily Planning Journal:



Directions

1. Enter today's date.

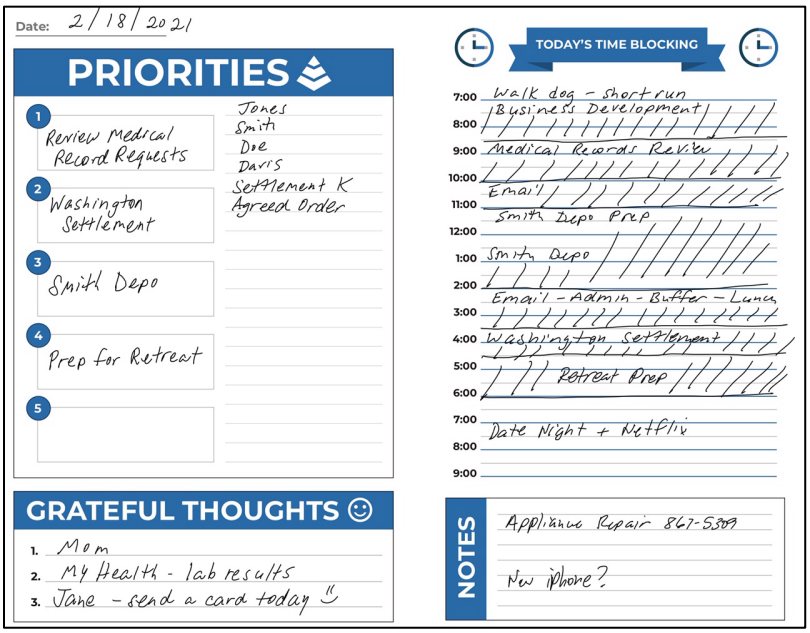
2. Identify 3 to 5 tasks that you want to focus on that day. If there are subtasks or notes, use the lines located to the right of the main tasks.

3. Time-block your entire day in 30-minute increments.

4. Enter 3 grateful thoughts.

5. Enter miscellaneous notes or life lessons that day.

Example of completed day:



Task Management—Weekly Planning

A once-a-week "get organized" deep dive is essential to successful time management and distraction control. This is a once weekly 60-minute commitment to help you frame realistic daily plans, review all tasks and deadlines on your plate, catch up on tasks that "slip between the cracks," and keep you focused on the big picture goals that you want to achieve. It will help you stay driven and will give you the power of creativity and a sense of control in your day and in your life.

How To Do a Weekly Deep Dive

1. **Do your weekly deep dive planning session on the same day and time each week.** Same time, same place, same channel! Plan 60 minutes for this session, one day per week. Performing this one-hour ritual on the same day and time each week will make it infinitely easier to develop a habit of engaging in this important planning. Moreover, it is proof to your team (and yourself) about how important and sacred this practice is to your organization.

2. **Think about using the "buddy system."** Learning new healthy time management habits is very much like learning new exercise habits. Team up with a colleague and do your own weekly deep-dive planning sessions at the same time. Let me be clear. You are not talking to each other or planning with each other. It is admittedly a little awkward, but just get on the phone or a web meeting and do your own planning in dead silence. In fact, commit *not* to disturb each other.

3. **The Weekly Deep Dive Checklist.** At each weekly planning session, these are all the planning tasks that you will perform:

Weekly Deep Dive Checklist

- ☐ **Review Calendar Two-Weeks Forward**. Open up your calendar and touch every single appointment on your calendar. Stop—pause—think about what you have to do to prepare for the appointment. Can you move forward with it? Do you have to do any research? Do you need to time-block (make an appointment with yourself on your calendar) to prepare? If so, block out your preparation time. If you need to look out

further than two weeks, adjust your look-forward time. For example, I look two weeks forward at every appointment, and then I look four additional weeks to find appointments that require travel arrangements, so I can make travel plans (book flights, hotels, rental cars, etc.) in time.

☐ **Review Calendar Two-Weeks Back.** Open your calendar and touch every single appointment on your calendar, going two weeks back. Stop—pause—think about whether you did everything that you promised people in those appointments. If not, schedule time to do those things and update your task list.

☐ **Review your Case/Matter/Project List.** Whether you work with cases, matters, projects, or all of the above, you'd better have a list of all your active cases, matters, and/or projects! If you don't, you absolutely should. Learn how to run reports from your software systems. Some people already do a weekly "case review" on their own or with their team. I used to do mine every Wednesday morning when I was in private practice. That is a different type of meeting than this weekly deep dive. It is an excellent practice and I highly encourage it! However, in that meeting, you *and your team* may dive into the nitty gritty of your cases to get a 500-foot view. In the Weekly Deep Dive, you are only spending about 10 minutes looking at the entire list from a 20,000- or 30,000-foot view. Review the list for the following:

- Does your list include all new cases, matters, or projects that landed on your plate this week?
- Can you remove any cases, matters, projects that closed this week?
- For each item on the list, ask yourself, "Am I on track or off track?" If you are off track, block off 15-30 or 60 minutes on your calendar to do a deep dive into that case, matter, or project. Do not stop your weekly deep dive into work on the project.

☐ **Review your Task List and Follow-Up Email Folder**. Review each and every item on your task list. Stop—pause—really think about each item. Just like with the calendar, above, you are *not* skimming. You are thinking about each item. Ask yourself:

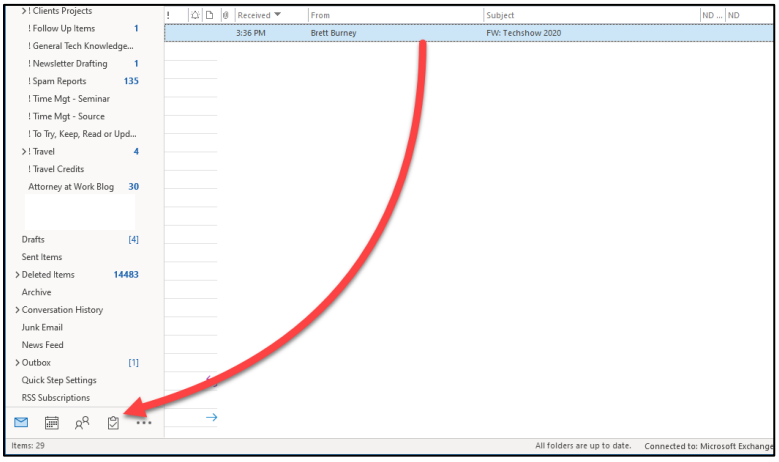
- Is the task complete? If so, mark it complete.
- Is the task still relevant? If not, delete it.
- Is the task overdue, urgent, or about to become urgent? If so, block off time on your calendar to get it done!

- Do you need to provide a status update to anyone?
- Do you need to follow-up with anyone in order for you to complete this task? Are you waiting on someone else?
- Finally, and this is important, remember to check all of your task lists, including any "Someday" or "Bucket" lists. We too often forget to check our strategic planning or quarterly or long-term lists and then these items never get done! It is vital that we have a routine/system in place that makes us review all items on all task lists.

☐ **Batch Process Email (Delete, Delegate, and Delay).** Process your inbox to **Delete** any emails that you can. Then, **Delegate** any emails you need to. Finally, if you need to **Delay** acting on an email, be sure to record it on your task list, create an appointment with yourself to do it (time block), and then save the email into the case/matter/project folder so you can delete it from your inbox. Remember, your inbox is a terrible task list. I know that I have already stated this, but I will say it again (and probably more)—stop using your inbox as a task list!

Note: You will note that I removed the **Do** from 4 D's during the weekly deep dive (you typically Delete, Do, Delegate, and Delay). This omission was intentional. If you do the "Do" during the weekly deep dive, it will not take you just 60 minutes to complete; it will take you all day. For the weekly deep dive, just focus on Delete, Delegate, and Delay.

Remember also, if you use Outlook, you can easily convert emails to tasks by dragging and dropping an email on to the Task icon in Outlook or use Quick Steps.



This function acts as a "copy" and will create a task, while still leaving the email in your inbox for you to take further action like creating a calendar event or filing it away. You can convert that same email to an appointment by dragging it on to your Calendar icon.

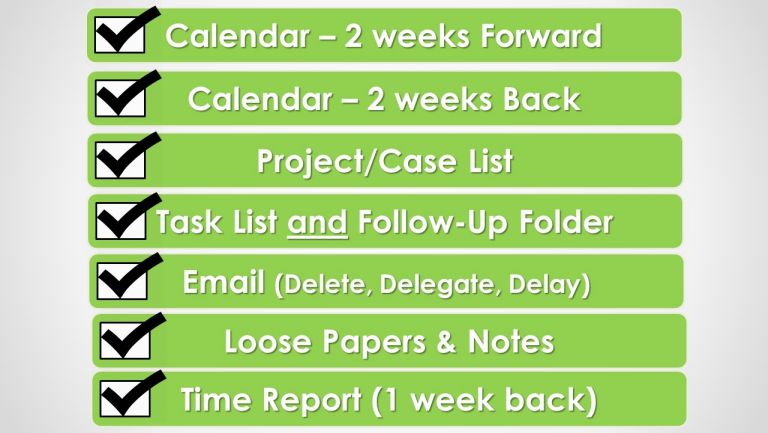
☐ **Clean your Desk, Piles, Stickies, and Notes**. During the week as life happens, it would be ideal to enter all tasks and do all your time blocking on your calendar immediately as tasks surface. We all know that this isn't the way it happens sometimes. You may be running out the door when the phone rings and someone asks you to do something. So, you quickly jot it down on a sticky note and slap it on your desk or computer monitor. Likewise, maybe someone dropped off a pile of paper that is sitting on your desk. All these things need processed or checked in. They are tasks and appointments that should be entered into your system and then you should scan and save those papers and throw away the sticky notes. The end result is that (1) you have a single place where you need to look & manage your tasks (not 10 or 20 notes, stickies, piles, etc.), and (2) you have a clean desk, which will help you focus.

- **Weekly Time Report.** Review your billable timesheets for the week. Learn how to run a report from your time billing and accounting system (or have someone run it for you). For this information, again, stop, pause, and think about each time entry and ask yourself:
    - Did I do everything that I promised relating to the activity that I performed for this time entry? If not, update your task list and/or schedule time on your calendar to do it.
    - Are there any follow-up items that I should pursue relating to this time entry?
    - Is there any potential new business or opportunities that I have overlooked? If so, add it to your task list and your calendar.

By performing this weekly ritual, you kill three birds with one stone:

1. You proof your time entries for typos, grammar, and accuracy, preventing you from having to do a massive review once a month.
2. You are reminded of tasks that you need to perform that you failed to do.
3. You will also stumble across time entries that you forgot to enter, thereby billing more time, and who doesn't want that?

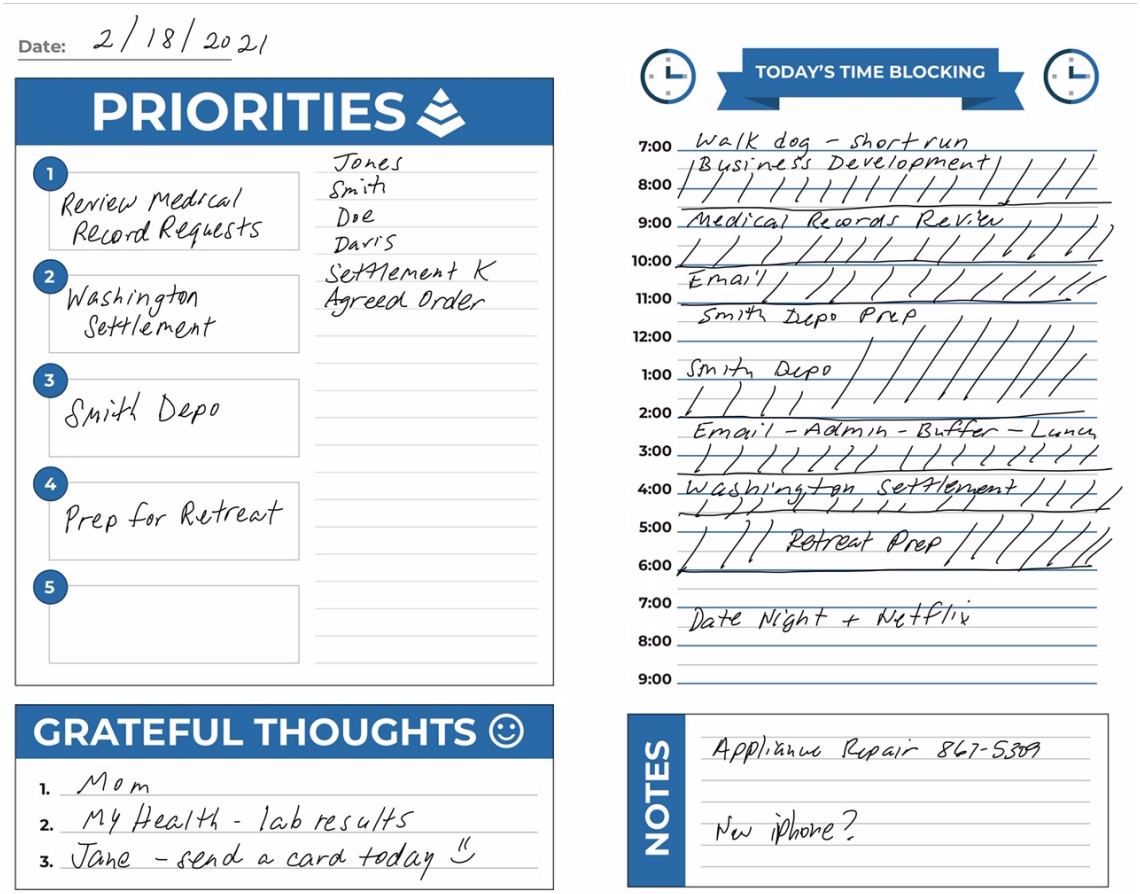
Here is a quick summary of all 7 things to do during your Weekly Deep Dive.



APPENDIX

TDC DAILY PLANNER

The Tame the Digital Chaos (TDC) daily planner is designed to help you plan and maximize productivity on a day-to-day basis. A bound print version of the planner is available at www.pauljunger.com, but feel free to print undated pages and fill them out on a daily basis. Here is a sample completed page. The next 2 pages contain the unfilled and undated blank form.



Date: 2/18/2021

PRIORITIES

1. Review Medical Record Requests
2. Washington Settlement
3. Smith Depo
4. Prep for Retreat
5.

Jones
Smith
Doe
Davis
Settlement K
Agreed Order

GRATEFUL THOUGHTS

1. Mom
2. My Health - lab results
3. Jane - send a card today

TODAY'S TIME BLOCKING

7:00 Walk dog - short run
8:00 Business Development
9:00 Medical Records Review
10:00
11:00 Email
12:00 Smith Depo Prep
1:00 Smith Depo
2:00
3:00 Email - Admin - Buffer - Lunch
4:00 Washington Settlement
5:00
6:00 Retreat Prep
7:00 Date Night + Netflix
8:00
9:00

NOTES

Appliance Repair 867-5309

New iPhone?

Date: _____

PRIORITIES

1

2

3

4

5

GRATEFUL THOUGHTS ☺

1. _____
2. _____
3. _____

TODAY'S TIME BLOCKING

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

NOTES

Date: _____

PRIORITIES

1.

2.

3.

4.

5.

TODAY'S TIME BLOCKING

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

GRATEFUL THOUGHTS ☺

1.

2.

3.

NOTES

To Order the Full Planning Journal, search "Tame the Digital Chaos Planner" on AMAZON or go to www.pauljunger.com