DECEMBER 2008

The Legal Connection

KEEPING LEGAL PROFESSIONALS CONNECTED

One-Box-Office

Everything you need to run your practice at your fingertips.

Along with D-A-F-T for keeping my e-mails organized, I have also been working on a concept called One-Box-Office.

It all started last summer when I was in PA and needed one file that I had not thought to take with me. That's when I realized no matter how digital I was, some of my information and projects were going to have a physical component and if I wanted to be truly mobile, I had to come up with a way to make my whole office mobile.

Hence, 'One-Box-Office' was conceived and since the summer I have been testing and tweaking the components to determine the best possible set up.

Here's the basics of what you will need - all of which can be easily purchased at any office supply store for less than $50:

1 plastic or metal box with rails for hanging folders
1 box multi colored hanging folders
1 2" binder with inside pockets
1 set of binder dividers (5 tab)
1 3 hole punch

See recommended products on Amazon: http://thedivaofdigital.blogspot.com/

Along with hanging folders, you can purchase zippered pouches (for pens, scissors or other smaller items), hanging storage cases (for items not paper) and thick plastic dividers – whatever works for you in terms of organization. Just try to keep the number of folders and items to a minimum. Your One-Box-Office is for items you actively need to run your office; not storage or filing.

The beauty One-Box-Office is the ability to play around with the process and tailor it to your style and business needs.

For followers of my D-A-F-T™ process (see page 2), set up of a One-Box-Office is easy - use one hanging folder for Defer, another for Act and a third for File. You can further break down and put active projects into their own colored file folder and hang behind the Act, Defer and File folders.

The 2" binder is to keep your finances organized. All banking documents, printed payment pages, receipts and tax notices are added to the appropriate section of the binder.

Here's a breakdown of the 5 tabs: Tab 1 – Bank Statements; Tab 2 – QB Reports; Tab 3 - Deposits; Tab 4 – Paypal/On Line Reports; Tab 5 – Gov't/Legal.

You probably noticed I have no tab for invoices in the financial binder. That's because I place all open invoices and bills that need to be paid in the inside left pocket. Once paid, I Toss client invoices (I have digital copies) and put the paid bills in a large tyvek envelope I store under my desk - there's no need to weigh down my One-Box-Office with this type of stuff. I love the fact that my financial binder gives me a quick way to check on outstanding invoices and upcoming bills just by looking in the inside cover (perfect for when you're on the phone with a client!)

Keep in mind you want your One-Box-Office to remain light and portable. This means you need to go through it regularly and purge with purpose.

My One-Box-Office also houses my fully charged laptop and my most recent back up discs. Meaning if I have my One-Box-Office, I can literally work from anywhere and if a natural disaster strikes, I only have to grab my One-Box-Office on the way out!

SMARTER TECHNOLOGY
Experience Counts

5 SOCIAL NETWORKING TIPS FOR NEWBIES

1. Pick one – Twitter, LinkedIn or Facebook
2. Open account, complete profile, load professional headshot
3. Do not import your address book – search for connections
4. Don't try to sell anything – ever. Social networking is about connections, not sales.
5. Don't get overwhelmed – social networking can really be a time drain. Limit yourself to one platform and spend no more than a half hour per day familiarizing yourself with the tools, tone and tasks to stay active.

We are all bombarded with so much information - on our computers, in our mail, on the phone and even through texting. Rather than making our lives easier and less stressful, it appears that technology is helping us lose the battle of information overload.

I've been running a home based practice for close to 8 years and have had my website since early 2002. So I certainly understand how being digital can make it that much more difficult to stay organized. In fact, I've read everything I could get my hands on and have gone so far as to purchase specific software in my quest to become and stay organized. Problem is, nothing I tried worked for me. :(

However, I did catch many pearls along the way, including the acronym FAT - which stands for File, Act, Toss. It's used by such well known organizational gurus as David Allen and Barbara Hemphill. I've followed these and other masters and did my best to organize by their rules. Unfortunately, I quickly learned that not everything that I came into contact with each day could be Acted upon, Filed or Tossed immediately!

Hence my system D-A-F-T™ Your Way To Organized was born. D-A-F-T™ adds the missing element that always seemed to trip me up and cause me to not be able to maintain whatever system or process I was trying to learn.

Just like F-A-T the "F" still stands for File, the "A" for Act and the "T" for Toss, but I've added the "D" (and rearranged the letters a bit) to make D-A-F-T™ - Defer, Act, File, Toss.

How can anyone use D-A-F-T™ to stay organized? It's easy, once you get the hang of it (just as any other system, D-A-F-T™ takes a little bit of time to put into place, but once you learn - it's so easy to apply!)

First say it to yourself a few times: "D-A-F-T™ - defer, act, file, toss"; "D-A-F-T™ - defer, act, file, toss".

Why am I having you do this? Because I want it to start to become second nature that when you are presented with something new (document, e-mail, request, etc.) - you immediately think "Do I need to defer, act, file or toss?" And then, of course, you do whatever it is that piece of information requires.

To begin, I'm going to explain how to use the D-A-F-T™ system to organize and stay on top of the hundreds, if not thousands, of e-mails you need to process each week. Once you understand how D-A-F-T™ is applied to e-mails, it is easy to incorporate as an organizational tool for off line processes too.

Using D-A-F-T™ to keep your e-mail under control:

Defer – Act – File – Toss.

To begin, you need the proper folders.

In your e-mail application, I want you to create 4 folders: ..Defer; .Act; .File; .Toss.

Please note there are two periods before the D in Defer, one period before the other folder names. This will make your e-mail application keeps these folders at the top of your folder list and in correct order.

These four folders – Defer, Act, File, Toss are all you need to get and stay on top of your e-mails and the electronic files and information that travel via e-mail every day.

The reason is because to be truly organized (honestly, there is no other way around it) – the ONLY way to be organized is if you keep your Inbox empty.

All the time.

I can almost hear every person out there giving a huge sigh … trust me, I know! Everyone says it – I get 100, 200, 500 plus messages each day, how am I supposed to empty out my Inbox every day?!?!

Well, that is what "D-A-F-T™" is for and being D-A-F-T™ will make keeping your e-mail inbox empty a breeze – even easy…

Here's how:

As you scan your Inbox, all you need do is determine which one of the 4 folders each message belongs – Defer, Act, File or Toss. Each message you look at should take you less than 10 seconds to determine its proper location within the D-A-F-T™ folders – Defer, Act, File or Toss.

You are not to do anything other than scan your Inbox messages and immediately sort each message into one of the 4 folders. Defer – Act – File or Toss.

You can scan your Inbox as many times a day as you feel comfortable; but only to move the messages to one of the D-A-F-T folders.

You do not stop the D-A-F-T™ process to write a reply – you do not stop the D-A-F-T™ process to print something out. You move those types of messages to the .Act folder and keep sorting the rest of your inbox until it is empty.

So, when scanning your inbox, the only thing you need to determine is which of the four folders – Defer, Act, File or Toss each message belongs. Once you get the hang of it, scanning your inbox literally takes a few minutes and you easily maintain an empty inbox.

Of course, each time you scan and empty your Inbox – you are not done!

Immediately click on the .Act folder and see which messages you decided needed you to Act. Each time you empty your Inbox, before you get up or do anything else, open the .Act folder and see what's in there.

According to David Allen's Getting Things Done, if the action will take less than two minutes - do it now. Scan your Act folder and immediately take care of anything which will take less than 2 minutes to complete. Once you complete the 2 minutes or

Your Way To Organized!

By: Andrea Cannavina, Digital Assistant

less action, move that e-mail message into the .File or .Toss folder as appropriate.

Now, if the action required of a message in your Act folder will take you longer than 2 minutes, you take 2 minutes right then and add the appropriate amount of time necessary to complete the action to your calendar.

So consider how much time each message in your .Act folder will take to complete and if more than 2 minutes, add an entry to your Calendar to get it done.

Once the appropriate amount of time and a date to complete the Act has been scheduled in your Calendar, you move the message to the ..Defer folder.

At this point in the D-A-F-T™ process, your Inbox and your .Act folders will be empty.

Once you have gone through and emptied your Inbox and .Act folders, if time permits, open the ..Defer folder.

Do a quick glance or sort to see if any of the items require your immediate attention, need to be scheduled into your Calendar or can be completed. When completed, items in the ..Defer folder are moved to the .File or .Toss folder as appropriate.
Only items moved from the .Act folder to the ..Defer folder will have a corresponding Calendar entry.

When you initially scan your Inbox, you may also move a message directly into the ..Defer folder. E-zines you want to read later are a good example of a type of message in the ..Defer folder which won't have a corresponding Calendar entry.

Keep in mind it is ok leave things in the ..Defer folder for an extended period; however, you should not accumulate messages where action is not at some point in the future necessary. This means if your ..Defer folder starts getting large, schedule time in your Calendar to go through and further organize with color or clean out.

So we've covered Act and Defer, next in the D-A-F-T™ process is "F" which stands for .File. .File is where you put any e-mails that you want to keep. Receipts for on line purchases, confirming e-mails and the like. You should try to keep the .File folder as small as possible. A few tricks are not to store anything which you can gain access to on line. Good examples of items you don't need to .File are YahooGroup messages or list serv discussions.

Now, when it comes to filing, I'm not big on having a ton of folders in my e-mail program. You could technically open a folder for each project, client, purchase… you name it. That just makes things more disorganized for me. This is why I group my .File e-mail by date. At the start of each month I create a folder by year and month (2008-11). At the beginning of the next month, anything in the .File folder, gets placed in the previous month's dated folder. I then .pdf the entire contents of that dated folder to store my e-mails with my other backed up business records and documents outside of my e-mail program.

To recap: using the D-A-F-T™ process you scan and move all messages from your Inbox to the corresponding Defer, Act, File or Toss folder. Inbox empty.

You then Act on any e-mails in the .Act folder that take less than two minutes and move to .File/Toss; or schedule time in your Calendar in the next day or so to complete the action and move the message to the ..Defer folder. Act folder empty.

As your schedule permits, but at least twice a day, scan through the ..Defer folder for items you have the time to complete or work on. The goal being that nothing stays in the ..Defer folder indefinitely.

The .File folder is for anything digital you wish to keep a record of.

Finally is .Toss. Consider .Toss as you would the recycle bin and use it the same way. Judicially toss any e-mails from anyone you don't know or which contain odd lettering or fishy looking attachments.

How the D-A-F-T™ System really comes together is at the end of the day and with general housekeeping.

At the end of each day, about 10 minutes before I wrap up, I scan my inbox and .Act folders to make sure everything is moved accordingly. I then scan my Calendar and navigate to the ..Defer folder to mull over anything I need to think about or deal with in the morning. And finally, I delete everything in the .Toss folder – making my Inbox, .Act and .Toss folders nice and tidy for the next day.

One of the best things about the D-A-F-T™ System is that it is a process that transcends the digital world and works just as well for paper.

To use D-A-F-T™ with paper you need three folders, stacking bins or other holding spots, labeling as above - ..Defer, .Act and .File (you can simply "Toss" papers into the old circular file!) The Defer file can be further broken down with weekly/daily dividers. Also, depending on your volume of paper – your File folder may need to have reinforced sides.

Just as with e-mails, you don't want to allow the paper in the .Defer and .File folders to become out of control. These folders exist to keep the information organized, at hand and moving -- not to serve as a permanent spot for anything.

Follow the sorting of paper documents as above for e-mails – placing each item in the appropriate Act, Defer and File folders. Clear out the Act folder by adding items to your Calendar and moving to the Defer folder; or completing the task and moving to the .File (or Toss) folder. Routinely go through the ..Defer folder to keep everything moving.

At least once per week, take the papers out of the .File folder and scan to .pdf to attach to the appropriate client/project file on your hard drive and/or file in the physical client/project folder.

That's it! You're done – e-mails and other electronic information, paper documents and even your calendar all organized with one simple system – one word really. No special software, no special training. Just the D-A-F-T™ principles outlined above put you in control the emails, information, files and documents that cross your desk each day. D-A-F-T™ - Defer Act File Toss your way to organizational success!

From the Blog:

Keyboard Shortcuts in Outlook

- Ctrl+1 -- Inbox
- Ctrl+2 -- Calendar
- Ctrl+3 -- Contacts
- Ctrl+4 -- Tasks
- Ctrl+5 -- Notes
- Ctrl+6 -- Folder list
- Ctrl+7 -- Shortcuts
- Ctrl+8 -- Journal
- Ctrl+Y -- Folder picker dialog

Use Ctrl+Shift+J to open journal entry for quick note of call or other billable time and stop watch to track project work.

When in Calendar (Ctrl+2), immediate hit Alt+number key. The higher the number, the more days you see. I prefer Alt+3.

The Diva of Digital

December 30th – 1:00 pm Eastern
BYOB: D-A-F-T Your Way To Organized!
http://www.eventbrite.com/event/225555643/affiliate1

January 2nd – 1:00 pm Eastern
2 Girls Talk Tech
http://www.blogtalkradio.com/2GirlsTalkTech

February 2009
LegalTech NY/LegalTypist Live!
*Reporting all day from the NY Hilton via **Twitter** E-mail andrea@legaltypist.com if you'd like to meet up.*

Andrea is now reserving 2009 dates for interviews, podcasts and radio shows. If you'd like to book Andrea for your live or digital event, e-mail requests and details to support[at]legaltypist.com.
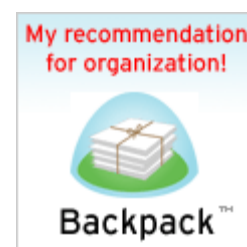
Some LOL and really, just really funny stuff

Louis CK on late night…

http://www.youtube.com/watch?v=vblGbZ6gq_Y