

D-A-F-T

Your Way to **ORGANIZED!**



A deceptively simple system
for getting things done.

Andrea Cannavina

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Acknowledgements:

First and foremost, my family. Their understanding of my digital pursuits has been the fuel of my success.

Napolean Hill – just an extraordinary human being. I have added a few of his thoughts on the next page.

ToastMasters International and specifically Syosset ToastMasters Club 3267. As a long standing member, I cannot give back all I have received from this organization and the many people I've been fortunate to meet through it.

Feedback/comments received about D-A-F-T:

I started using your D-A-F-T system and my life is already so much easier.

I loved your D-A-F-T article. It's the first time I've read an article on organization that made sense and is something almost anyone can do.

...your "D-A-F-T process" for email management ... is excellent and is certainly applicable to any company.

Thanks for your D-A-F-T system. My Yahoo inbox is empty for the first time in years!

Using the D-A-F-T system is so simple and quick it has helped me to organize my e-mail strategically in order to be more efficient and effective. I no longer dread my inbox because the D-A-F-T system keeps it empty! Thank you, Andrea!

Susan Cartier Liebel, Founder & CEO of Solo Practice University® <http://solopracticeuniversity.com>

Seriously worth a read - she knows from whence she speaks!

Ross Kodner, President and founder of MicroLaw, Inc., a 20+ year old Milwaukee, Wisconsin-based legal technology consultancy and turnkey legal automation system provider.

Are You On Overload Yet?

We are all bombarded with so much information – in our mail, on the phone, through the computer and even texting to our cell phones.

Rather than making our lives easier and less stressful, technology appears to be making the battle of information overload that much harder to win. Buzzes, flashes, dings and rings ... the digital never stops! Pile on the paper that crosses through your world every day and no wonder most people feel completely overwhelmed.

I should know... I've been running a home based business working with attorneys and law firms for 10 years. In those 10 years, I've had and/or raised two children, completed a full house restoration of our 1924 Colonial home located on Long Island, New York, along with taking my one woman show and making my company a national corporation helping firms of 1-100+ attorneys get the work done. In other words, I've been dealing with e-mail (and lots of it) for a decade.

What I quickly learned in business is that going digital can make it that much harder to stay organized, not easier - as some tech sales reps would lead you to believe.

I've tried to keep up. Over the years, I've read everything I could get my hands on pertaining to organization. In my quest to become and stay organized, I've even gone so far as to purchase specific software and have paid my hard earned dollars to attend special classes and lectures on the topic.

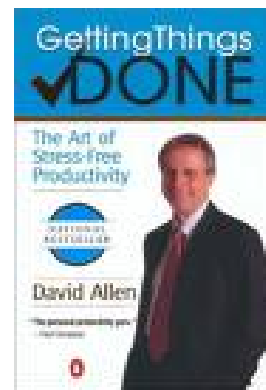
Seems like everyone likes to spend a lot of time telling me why I need to be organized (which, of course, I already know) and not enough time explaining to me “how” to get organized.

That’s not to say I didn’t learn a few pearls of wisdom in my journey be able to more easily stay on top of all the information that comes into my word each day.

Just that it is a journey and you will learn a bit from me, a bit from someone else and at some point you are going to morph it into the system that you use.

One item that stuck with me was the acronym F-A-T. It stands for File, Act, Toss.

I first read about it in David Allen’s **Getting Things Done** - a great book for those who are organizationally challenged. Reading this book, you learn of some of the emotional roadblocks to getting and staying organized.



Those are NOT the types of issues I cover in this book. The purpose of this book is to give you the “how” to get organized – an easy to remember, consistent process you can use to stay on top of all the information – digital and paper – encountered in our crazy mish mosh of business/life.

I did learn a LOT from reading **Getting Things Done**, so I highly recommend you pick up a copy and read it too. In fact, I’ve been touting the merits of this book for a very long time. It’s what got me organized. It didn’t keep me organized – which I’ll get to in a little bit.

Getting Things Done made me realize that:

a. **I had to write stuff down.** No matter how good my brain is at keeping information handy – I still needed to get it out of my head in order for it to (i) clear up my grey matter for more important stuff; and (ii) be in a form to be acted upon (by me or someone else).

b. **I had to write the stuff down in one place.** I used to use a blotter but that solution certainly is not portable. So I got a notebook. Well, first I tried to kill two birds and have a calendar with space to write down stuff on each day. But, just as I found one that I liked - it got discontinued. I now use the simple Mead 5 Star 2 subject notebook. Available anywhere for under \$5.00. Each day I flip to a new page, date it and anything I need to jot down, I do. Anything jotted that is important is then transferred to where ever it needs to go (Outlook contact; add to new client process, etc.) I then put a big check mark through it in my notebook. If I didn't have a notebook, I wouldn't have a place to start the capture process; nor an instant follow up system in place with no extra effort.

c. **I had to get organized.** Until I took the time to do so, I was going to be like a hamster on a treadmill – endlessly running from one emergency to another - all because things were slipping through the cracks because I wasn't organized.

What I didn't like about **Getting Things Done** were the lists.

To be honest, at first, I loved the lists. I think lists give one a sense of control. Where the lists failed for me was in the amount of time/focus I spent keeping them all up to date and synced across all my equipment/devices.

I now get the same sense of control from my notebook and jotting things down/crossing off. No list necessary.

Now, I've followed David and other masters of organization and productivity and I did my best to play by their rules – especially one of the most wide-spread rules: File, Act, Toss.

Unfortunately, I quickly learned that not everything that I came into contact with each day could be Filed, Acted upon or Tossed – so this process just didn't cut it for me.

In fact, I was starting to get discouraged, thinking about how much money I'd spent on books, classes and "systems", and how much time I had invested in learning how other people set their businesses up, and yet, I still wasn't organized. Things were slipping through the cracks; not getting done on time or if getting done, getting done very last minute. I knew I needed to do something. But everything I was trying, wasn't working.

Then I thought – "What if there is no system out there? What if I keep spending time and energy learning that what works for other people, doesn't work for me?!"

That's when I realized I could either invest more time and money learning other people's systems; or I could just as well figure out a way to organize myself that worked for me.

That's how the D-A-F-T™ project began – as a personal journey to figure out a way to keep me and my digital/paper information organized. I never intended for my system to work for anyone but me, so only considered myself and my needs (which was refreshing after consulting and configuring things around other people's needs in my day job).

To start, I listed what I needed from a system. I knew it had to:

- ✓ be easy to remember/use
- ✓ work for two of my biggest time drains – email and task organization
- ✓ work as well for paper as it did on for digital, and, if possible,
- ✓ work with what I already owned and knew how to use.

I know. That's a pretty tall order. I didn't even know if it would be possible; but those were my requirements.

So I began to ruminate and think about it more and more. I began to notice what things I handled most, and how I handled them and I kept coming back to F-A-T.

I knew almost everything I touched could be Filed, Acted Upon or Tossed but there was something missing because not EVERYTHING I touched could be.

So I kept ruminating and pondering the types of items that didn't fit, and then it dawned on me! What did all those items have in common? They needed a place to hang for a bit. That's what I was missing!

Sometimes you just need to let something set for a bit and with F-A-T, I had no place for these types of items.

I immediately thought of adding Ruminare to the mix, but the first acronym that came to mind was FATR – and that did not bode well... so I ditched Ruminare and what came next was "Defer" - Bingo!

In D-A-F-T the "F" stands for File, the "A" for Act and the "T" for Toss, but I've added the "D" and rearranged the letters making D-A-F-T - Defer, Act, File, Toss.™ A simple yet very comprehensive system that works to keep anything organized.

How can anyone use D-A-F-T to stay organized? Honestly, it's really easy, once you get the hang of it.

As with any other new way of doing things, D-A-F-T takes a little bit of time to put into place, but unlike complicated software and processes, once you learn the main principles of D-A-F-T it becomes very easy to apply and use.

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

Think about it a bit.

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, email, request, etc.) - you immediately think "Do I need to Defer, Act, File or Toss?"

That's it. The secret is out! All you have to do is think – "Hmmm ... do I need to do something right now, hold on to this for later, toss this or put it someplace for safe-keeping/future reference?"

If you can remember DAFT - Defer, Act, File and Toss – honestly, you have all you need to get and stay organized.

Can't be that easy, I know that's what you're thinking. I thought so too. After using it for myself for a few years; and then sharing it with others, I know it helps. Here's how:

Just like David Allen's FAT – in D-A-F-T™ the "F" stands for File, the "A" for Act and the "T" for Toss, but I've added the "D" and rearranged the letters making D-A-F-T™ - Defer, Act, File, Toss

D –Defer
A –Act
F –File
T - Toss

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 keep your inbox under control, it is easy to incorporate D-A-F-T as an organizational tool for off line processes too.

Using D-A-F-T™ To Keep Your Email Under Control

Defer – Act – File – Toss.

Outlook Users:

Right click on Personal Folders in the left navigation (under “All Mail Folders”); select New Folder, name it, make sure “Post and Mail Items” and the correct “Personal Folders” is highlighted and click OK. Now move the folder to the “Favorite Folders” – again by dragging and dropping: Click on the folder, holding down the left mouse key and drag it to the upper window. Let go.

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

Please note: I have intentionally placed two periods before the D in Defer and one period at the start of each name of the other three folders. This is so your e-mail application will keep these folders at the top of your list and in the correct order.

These four folders – Defer, Act, File, Toss are all you need to get and stay on top of your emails and the electronic files and information that travel via email 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 know! Everyone says it – I get 100, 200, 500+ messages each day, how am I supposed to keep my inbox empty all the time?! That is what D-A-F-T is for and it will make keeping your inbox empty easy – even a breeze ...

How To Apply D-A-F-T

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. 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.

Each message you look at should take you less than a few seconds to determine the proper location within the D-A-F-T 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 the messages until your inbox until is empty.

IMPORTANT: When scanning your inbox, the only thing you are to do is determine 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.

Each time you scan and empty your Inbox – you are not done with D-A-F-T!

Once your inbox is empty, you immediately click on the .Act folder to see which messages you decided needed you to do something.

Look at each message in .Act and decide if the action you determined was necessary will require will more or less than 2 minutes to complete.

If less than 2 minutes, take care of that item right then and there; then move that message out of Act folder.

RECAP: Scan and empty your inbox then scan your Act folder and immediately take care of any item which will take less than 2 minutes to complete. Once you complete the action, move that message into the Defer, .File or .Toss folder, as appropriate.

Your Act folder now contains only messages that require action that takes longer than 2 minutes. For these messages, you are going to take 2 minutes and consider what you need to do and when you have the time to do it. You will then add the appropriate amount of time you need to complete the action to your calendar.

Outlook Users:

Drag and drop the e-mail message into the Calendar tab to open a new appointment window.

Every message left in your Act folder will require you to take 2 minutes and complete or take 2 minutes to consider how much time the required action will take to complete and to add an entry to your Calendar to get that action done.

Once the appropriate amount of time and a date to complete the action 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 and anything urgent will have been taken care of. Items that need time to complete have been calendared and saved in a manner for easy reference.

If you want to stop the D-A-F-T™ process here and move on to something else besides e-mail, you're good to go!

However, once you have gone through and emptied your Inbox and Act folders, AND, if time permits, you can go and open the Defer folder.

The Defer folder will only have items in a holding pattern or non-urgent items which have a corresponding calendar entry to complete the item.

You can 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. Please note, 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. Ezines you want to read later are a good example of a type of message for 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 (i.e., read the last three issues of The Legal Connection Ezine). ;)

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 good trick is not to store anything which you can gain access to on line; and to use gmail or other non owned by you domain for receipt, organization and storage of ezines and other non-work pertinent correspondence.

Good examples of items you don't need to File are YahooGroup messages or list serv discussions (such as those by the ABA's [Solosez](#)).



Outlook Users:

Sort each D-A-F-T™ folder by sender, date, subject line, color, category and conversation, or use colored flags to further organize the contents of the D-A-F-T™ folders.

When it comes to filing, I'm not big on having a ton of folders in my email 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 for the last month (i.e., 2011-03). I then block/copy all messages in the File folder into that month's dated folder. I also block/copy any emails in my Sent folder for that month into dated folder.

I now have a record of everything I wanted to keep that came in, and anything I sent out in one spot, organized by date. For back up, I .pdf the entire contents of each dated folder to store with my other backed up business records and documents outside of my email 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 2 minutes and move the message 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.

Defer folder managed.

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

Filing complete.

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

Housekeeping/admin/maintenance done.

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/ruminate on anything I need to think about or deal with in the morning.

Finally, I delete everything in the Toss folder – making my Inbox, Act and Toss folders empty for the next day's barrage of incoming!

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.

Using D-A-F-T™ To Keep Your Desk Under Control

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 emails, 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 emails – 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 – emails 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 put you in control of 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!

About The Author:



Andrea Cannavina is a Master Virtual Assistant who specializes in helping professionals upgrade their processes to digital in order to get more done with less – less time, less resources and less stress!

Just a sample of topics Andrea has presented: *Go Virtual! Tools of the Trade, Working the Web Securely, Effective E-mail, Creating a Digital Workflow and Websites 101.*

Andrea has presented to the Suffolk County Bar Association, Association of Legal Administrators, International Virtual Assistants Association and the OIVAC.com

Along with speaking to virtual and live audiences, Andrea publishes *The Legal Connection* e-zine and blogs at <http://www.blog.legaltypist.com>. To follow Andrea on twitter: <http://twitter.com/legaltypist>

If you'd like to set up a complimentary call to speak with Andrea about your group, organization or company, or to see if she can tweak your tech, set up a complimentary call: <http://tungle.me/AndreaCannavina>

Andrea recommends:



Getting Things Done: The Art of Stress-Free Productivity

David Allen

Great framework to understand WHY you need to get organized and help you manage the change necessary to be organized.



The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It

Michael E. Gerber

Doesn't matter if you are a virtual or brick and mortar - if you're "in" business, you need to read this book.



The One Minute Manager

Kenneth H. Blanchard, Spencer Johnson

You are now organized; understand you need to delegate; now do that as efficiently as possible too.



Purple Cow, New Edition: Transform Your Business by Being Remarkable
Seth Godin

You're organized, have your processes and people in place, can manage your time and resources effectively - now tell the world.