Productivity Bootcamp: Time and E-mail Management for Lawyers

January 31, 2019

9:30 a.m. – 12:30 p.m.

CBA Law Center

New Britain, CT

CT Bar Institute Inc.

CT: 2.5 CLE Credits (General)
NY: 3.0 CLE Credits (LPM)

Lawyers' Principles of Professionalism

As a lawyer I must strive to make our system of justice work fairly and efficiently. In order to carry out that responsibility, not only will I comply with the letter and spirit of the disciplinary standards applicable to all lawyers, but I will also conduct myself in accordance with the following Principles of Professionalism when dealing with my client, opposing parties, their counsel, the courts and the general public.

Civility and courtesy are the hallmarks of professionalism and should not be equated with weakness;

I will endeavor to be courteous and civil, both in oral and in written communications;

I will not knowingly make statements of fact or of law that are untrue;

I will agree to reasonable requests for extensions of time or for waiver of procedural formalities when the legitimate interests of my client will not be adversely affected;

I will refrain from causing unreasonable delays;

I will endeavor to consult with opposing counsel before scheduling depositions and meetings and before rescheduling hearings, and I will cooperate with opposing counsel when scheduling changes are requested;

When scheduled hearings or depositions have to be canceled, I will notify opposing counsel, and if appropriate, the court (or other tribunal) as early as possible;

Before dates for hearings or trials are set, or if that is not feasible, immediately after such dates have been set, I will attempt to verify the availability of key participants and witnesses so that I can promptly notify the court (or other tribunal) and opposing counsel of any likely problem in that regard;

I will refrain from utilizing litigation or any other course of conduct to harass the opposing party;

I will refrain from engaging in excessive and abusive discovery, and I will comply with all reasonable discovery requests;

In depositions and other proceedings, and in negotiations, I will conduct myself with dignity, avoid making groundless objections and refrain from engaging I acts of rudeness or disrespect;

I will not serve motions and pleadings on the other party or counsel at such time or in such manner as will unfairly limit the other party's opportunity to respond;

In business transactions I will not quarrel over matters of form or style, but will concentrate on matters of substance and content;

I will be a vigorous and zealous advocate on behalf of my client, while recognizing, as an officer of the court, that excessive zeal may be detrimental to my client's interests as well as to the proper functioning of our system of justice;

While I must consider my client's decision concerning the objectives of the representation, I nevertheless will counsel my client that a willingness to initiate or engage in settlement discussions is consistent with zealous and effective representation;

Where consistent with my client's interests, I will communicate with opposing counsel in an effort to avoid litigation and to resolve litigation that has actually commenced;

I will withdraw voluntarily claims or defense when it becomes apparent that they do not have merit or are superfluous;

I will not file frivolous motions;

I will make every effort to agree with other counsel, as early as possible, on a voluntary exchange of information and on a plan for discovery;

I will attempt to resolve, by agreement, my objections to matters contained in my opponent's pleadings and discovery requests;

In civil matters, I will stipulate to facts as to which there is no genuine dispute;

I will endeavor to be punctual in attending court hearings, conferences, meetings and depositions;

I will at all times be candid with the court and its personnel;

I will remember that, in addition to commitment to my client's cause, my responsibilities as a lawyer include a devotion to the public good;

I will endeavor to keep myself current in the areas in which I practice and when necessary, will associate with, or refer my client to, counsel knowledgeable in another field of practice;

I will be mindful of the fact that, as a member of a self-regulating profession, it is incumbent on me to report violations by fellow lawyers as required by the Rules of Professional Conduct;

I will be mindful of the need to protect the image of the legal profession in the eyes of the public and will be so guided when considering methods and content of advertising;

I will be mindful that the law is a learned profession and that among its desirable goals are devotion to public service, improvement of administration of justice, and the contribution of uncompensated time and civic influence on behalf of those persons who cannot afford adequate legal assistance;

I will endeavor to ensure that all persons, regardless of race, age, gender, disability, national origin, religion, sexual orientation, color, or creed receive fair and equal treatment under the law, and will always conduct myself in such a way as to promote equality and justice for all.

It is understood that nothing in these Principles shall be deemed to supersede, supplement or in any way amend the Rules of Professional Conduct, alter existing standards of conduct against which lawyer conduct might be judged or become a basis for the imposition of civil liability of any kind.

--Adopted by the Connecticut Bar Association House of Delegates on June 6, 1994

Table of Contents

Productivity Boot Camp: Time and E-mail Management for Lawyers (EDU190131)

Agenda

9:30 a.m. – 10:00 a.m.	Overview of the 8 Fundamentals of Improved Productivity for Attorneys
10:00 a.m. – 10:30 a.m.	Planning Effectively, Capturing/Updating Tasks
10:30 a.m. – 11:00 a.m.	Prioritizing and Scheduling, Delegating, and Supervising
11:00 a.m. – 11:30 a.m.	Organizing Information, Optimizing Procedures, E-mail Management
11:30 a.m. – 12:00 p.m.	Framing Expectations, Cultivating Strong Habits
12:00 p.m. – 12:30 p.m.	Putting It All Together

Bill Jawitz is the founder of SuccessTrackESQ, an executive coaching and consulting firm that works exclusively with attorneys, their firms, corporate legal departments, and government agencies.

Since 2002, Bill has coached thousands of lawyers around the country to grow their practices and improve their productivity -- *and* derive greater enjoyment from the practice of law.

Bill has conducted over 120 training programs for numerous state, city and regional Bar Associations, and national CLE providers. He teaches attorneys how to apply best practices in key areas such as time management, business development, workflow management, team building, and leadership development.

Bill holds a BA in Media Studies from Quinnipiac University and a Master's degree from Columbia University in Communications and Technology.

In his first professional life, Bill was an educator and author. He founded and ran Connecticut's first public charter school (The Odyssey Community School, in Manchester) and authored the nation's top-selling textbook on media literacy, *Understanding Mass Media*.

Bill is volunteers time with *The Mankind Project*, a non-profit organization, and is an active guitarist and vocalist. He is a self-described C-SPAN and SCOTUS junkie. Bill lives with his wife, in Milford, CT.

Connecticut Bar Association

Productivity Bootcamp

January 31, 2019

Bill Jawitz

SuccessTrackESQ

1

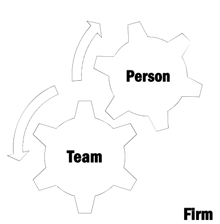
THE EIGHT ELEMENTS

1. Plan Effectively
2. Capture & Update Tasks
3. Prioritize & Schedule
4. Delegate & Supervise
5. Organize Info
6. Optimize Procedures
7. Frame Expectations
8. Cultivate Awareness

2

3 INTERDEPENDENT DIMENSIONS

- Firm culture
- Team norms
- Individual behavior

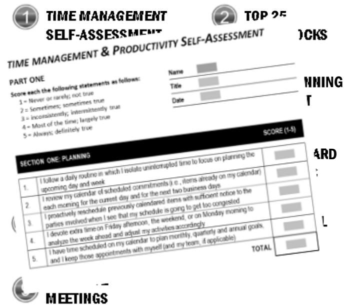


3

MATERIALS

PRACTICE DEVELOPMENT
RESOURCE PACK

Text "RESOURCES" to 444999



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TWO TRUTHS

If you don't control your time, other people and events will

There is always more to do than time available

5

THE GREAT MISNOMER

We can't:

Get more time
Have more time
Make more time
Find more time

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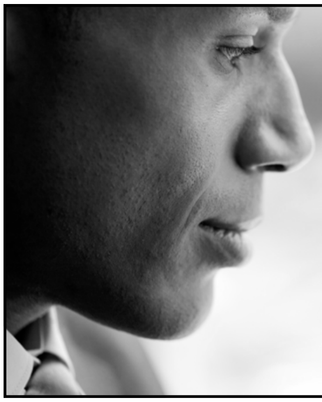

IT'S NOT TIME MANAGEMENT

It's **self** management

It's **choice** management

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4 CHALLENGES

Internal
Resistance to change; "Not enough time"

External
Always-on tech clients / colleagues

Firm culture

No Single "Best" Method

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SPAN OF CONTROL*

What can you **control**?

What can you **influence**?

What is truly **beyond** your control or influence?

*Caveat: Organizational Hierarchy

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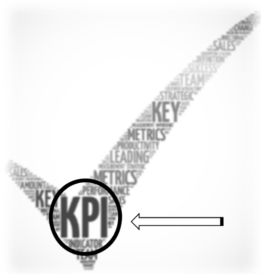

GOALS AND OBJECTIVES

GOALS are aspirational

OBJECTIVES are measurable states in time

Get clear, get specific

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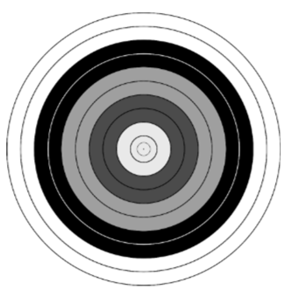
If you were more productive and enjoyed greater peace of mind one year from today, what would you have gotten better at?



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1 53 33 13 2 54 34 14
17 29 45 18 30
41 49 21 42 50 22 46
9 25 5 26 6
37 57 10 38 58
3 55 35 15 4 56 36 16
32
19 31 47 20
43 51 23 44 52 48
27 28 40 24
11 39 59 7 12 60 8

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SELF-ASSESSMENTS

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THE EIGHT ELEMENTS

1. Plan Effectively
2. Capture & Update Tasks
3. Prioritize & Schedule
4. Delegate & Supervise
5. Organize Info
6. Optimize Procedures
7. Frame Expectations
8. Cultivate Awareness

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A PREREQUISITE

Knowing your destination

Vision for your practice

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PLAN EFFECTIVELY

1

Daily
Quarterly
Annually

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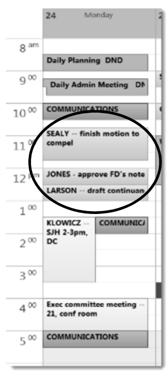
DAILY PLANNING

15 – 30 Minutes First Thing

1. Note the day's free space
2. Block communication time
3. Review written task list
4. Select 1 – 3 top items
5. Project realistic time for each
6. Enter those blocks
7. Scan rest and next week
8. Execute adjustments



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DAILY TEAM PLANNING

Review schedule
Communication
Action on files
Admin tasks

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② CAPTURE & UPDATE TASKS

Accessible and Trustworthy

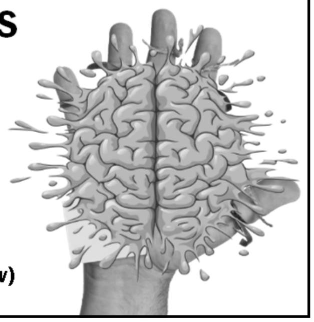
ToDoist / Outlook Tasks

Practice mgmt platform

OneNote

Three ring binder

Legal Pad (NOT white or yellow)



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5 TASK CATEGORIES

1. **Production (legal work)**
2. **Delegated production**
3. **Administrative**
4. **Marketing**
5. **Personal**

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③ PRIORITIZE & SCHEDULE

Urgent and Important	**Important but Not Urgent**
Urgent but Not Important	**Not Important and Not Urgent**

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CONFLICTING PRIORITIES

Make criteria explicit

- Removal of impediment
- External deadlines
- Speed to revenue
- Capacity building
- Most satisfying

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TIME -TASK ESTIMATES

- Check whitespace
- Determine scope
- Pause to reflect
- Add 33%
- Track for one week

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THE MYTH OF MULTITASKING

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SEE FOR YOURSELF

A B C D E F G. . . . Z
1 2 3 4 5 6 7. . . . 26

A B C D E F G . . . Z
1 2 3 4 5 6 7 . . .26

25

4 DELEGATE & SUPERVISE

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EFFECTIVE DELEGATION

- Specificity
- Level of authority
- Feedback

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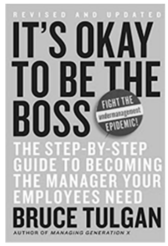
FEEDBACK

During and after, depending on assignment

FAST Feedback

- Frequent
- Accurate
- Specific
- Timely



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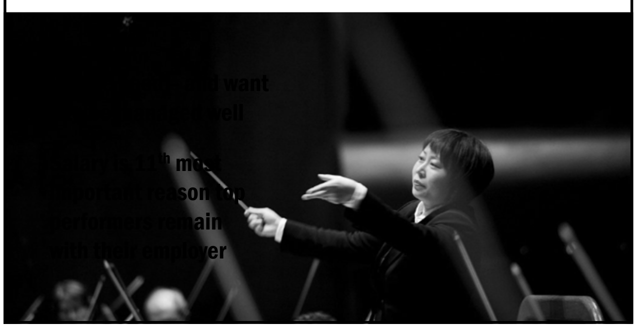
BE THE CONDUCTOR



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RPC 1.1 Competence

A lawyer shall not:

- Handle or neglect a matter … in such a manner that the lawyer's conduct constitutes gross negligence
- Exhibit a pattern of negligence or neglect in the lawyers' handling of matters generally

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RPC 1.3 Diligence

A lawyer shall act with reasonable diligence and promptness in representing a client

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RPC 1.4 Communication

(a) A lawyer shall fully inform a prospective client of how, when and where the client may communicate with the lawyer

(b) A lawyer shall keep a client ***reasonably*** informed about the status of a matter and promptly comply with reasonable requests for information

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RPC 1.4 Communication

(c) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation (enough time to process, verifying conversations)

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RPC 5.1 Supervision

(b) A lawyer having direct supervisory authority over another lawyer shall make reasonable efforts to ensure that he/she conforms to the RPC

(c) A lawyer shall be responsible for another lawyer's violation of the RPC . . . (orders, ratifies, or knows of)

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RPC 1.6, 1.7/8

- **Confidentiality of Information**
- **Conflict of Interest**

(investing time and $ in appropriate technology

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5 ORGANIZE INFO

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SEARCH STATS

25%	Time spent looking for information	aiim
38%	Time spent recreating existing content after failed search	IDC
61%	Annual growth in enterprise info	FORRESTER

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Password Management

dashlane

LastPass

RoboForm

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PAPER & DIGITAL FILING

- Folder location and naming conventions
- Hire a professional organizer (Laura Leist, EliminateChaos.com)
- Calendar monthly time

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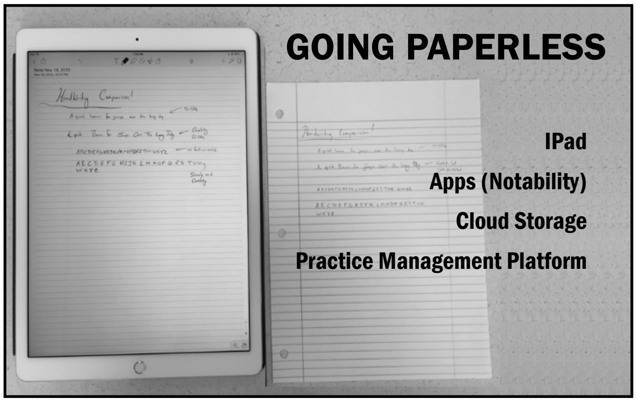
GOING PAPERLESS
IPad
Apps (Notability)
Cloud Storage
Practice Management Platform

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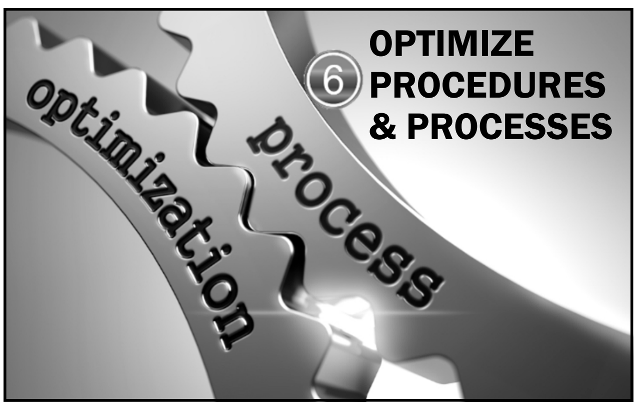
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OPTIMIZE
PROCEDURES
& PROCESSES
optimization
process

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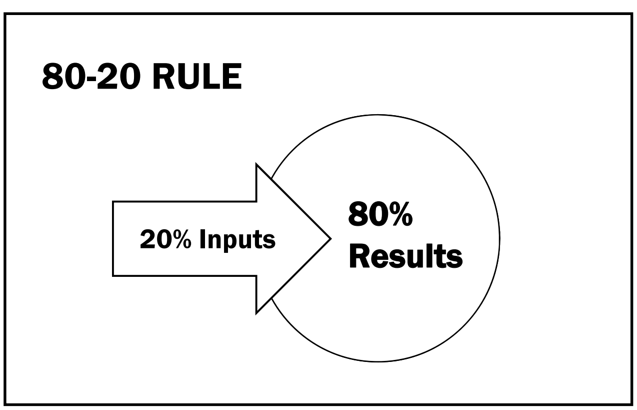
80-20 RULE
20% Inputs
80%
Results

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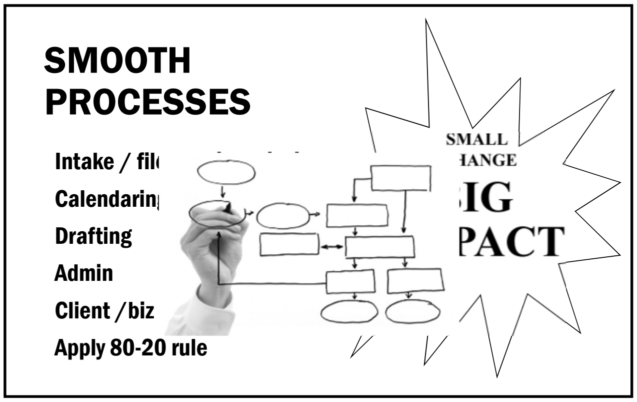
SMOOTH PROCESSES
Intake / fil
Calendarin
Drafting
Admin
Client / biz
Apply 80-20 rule
SMALL
HANGE
IG
PACT

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EFFICIENT TOOLS
Office365
zoom
Video Conferencing
DRAGON

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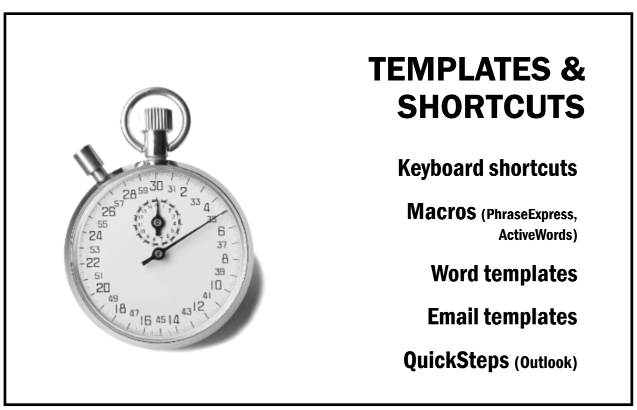
TEMPLATES & SHORTCUTS
Keyboard shortcuts
Macros (PhraseExpress, ActiveWords)
Word templates
Email templates
QuickSteps (Outlook)

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TRAINING INVESTMENT

Paradox: must devote time and $ to use time more effectively

Most overlooked contributor to organization-wide productivity

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MEETINGS

- Purpose
- Punctuality
- Action Commitments
- Specific Communication
- Follow-up
- Death by Meeting

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TIME SPENT ON EMAIL

Forty

days

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TAKING CONTROL

Email mgmt = core work responsibility

4 Key Strategies

1. Reduce Volume
2. Improve Quality
3. Manage & Organize
4. Teach Others

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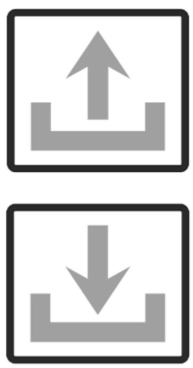
STRATEGY #1

Reduce Volume
Out & In

1. Send less to get less
2. Dispense with internal "Thanks!" (and greeting)
3. Use separate addresses
4. Use spam filters, block senders, and unsubscribe
5. Educate top offenders



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SEND LESS EMAIL

Why are you sending THAT message?

Does the recipient need it then – or at all? (minimize RTA's / cc's)

Is email the best channel?

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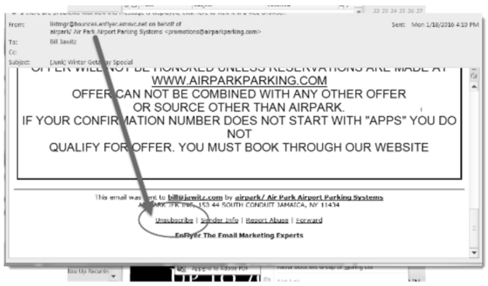
BLOCK & UNSUBSCRIBE



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STRATEGY #2

Improve Quality

Get better and faster responses (everyone else is swamped too)

Effective subject lines

Effective body content

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QUALITY SUBJECT LINES

Be descriptive and specific

Use prefixes and suffixes

Change subject line instead of re-using an old email

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SPECIFICITY & PREFIX / SUFFIX

ACTION: Schedule Jones mock depo for 12.5, 2-7pm

DELIVERED: Baker summary judgment motion for your review

INFORMATION REQUEST CONFIRMED

EOM (end of message)

NRN (no reply needed)

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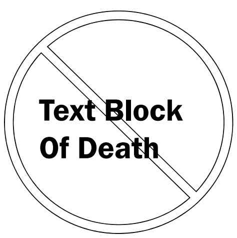
BODY CONTENT



[redacted]	FW: PTO/vacation policies	Fri 10/2/2015 6:17 PM	30 KB
	vacation	Fri 10/2/2015 10:09 AM	69 KB
	FW: (project info, scheduling) RE: em...	Tue 6/30/2015 6:34 PM	374 KB

FW: PTO/vacation policies

[redacted] <[redacted]>

You replied to this message on 10/2/2015 6:35 PM.

Sent: Fri 10/2/2015 6:17 PM

To: Bill Jawitz

Dear Bill: Thank you for your quick and efficient assistance today on this . I wound up doing a combination of my wording and yours (see below) and really wanted to send it out before the day passed as people wanted answers and want to plan their time. It has been sent and we shall see how it evolves. Interestingly, in a conversation with [redacted] yesterday, she thought it would not be a problem if 2 paralegals were out at the same time, specifically [redacted] and [redacted] with [redacted] being the only para here. [redacted] requested several days that [redacted] already had been granted off. Apparently Vivian spoke to [redacted] and said she has at times been the only para in the office and so it should be fine. I am not surprised at [redacted]s position but was surprised & disappointed by [redacted]'s. I am not even sure what time period [redacted] is referring to, but if she was the only one it was likely a time when we were just not fully staffed or time was taken that was unplanned etc… – I would not have knowingly authorized time out so that there was only 1 paralegal in place for any length of time. I think it is absurd. Thank you and have a great weekend!

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BODY FORMAT

1 topic per message

Main points, attachments & instructions at the top

Section headers

1 thought per paragraph

Line breaks & bullets

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STRATEGY #3
Organize & Manage

Use sub-folders and rules / filters

Customize toolbars

Use YouTube to learn how

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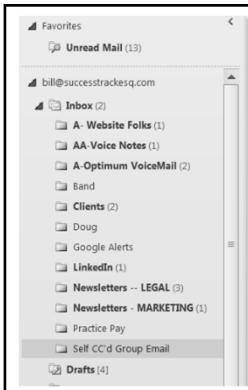
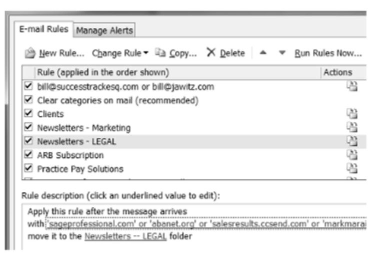
SUB-FOLDERS AND RULES





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STRATEGY #4

Encourage Others

Model best practices

Identify top offenders (volume and quality)

Provide resources

Propose specific incremental change

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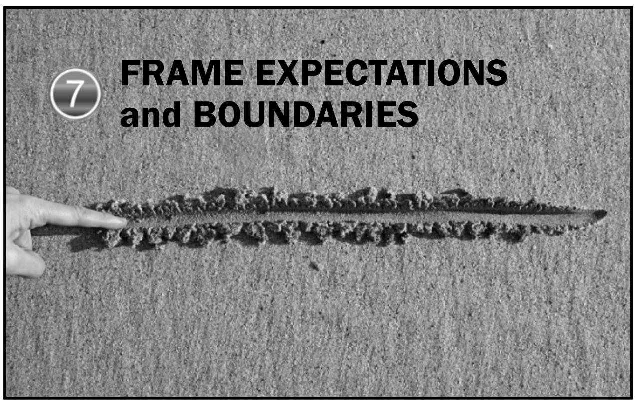

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STANDARDS & BOUNDARIES*

- **What people can expect from you**
- **What you'll allow**
- **Calibrate / re-calibrate with constituents**

What do we
Expect
from each other?

*On and off the bench

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DO UNTO OTHERS

3 interdependent dimensions

Balance self interest and group interest

Mutual accountability

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ASSESS URGENCY

- Define "emergency"
- Downstream impact
- Mindfulness
- Span of control
- Batch questions

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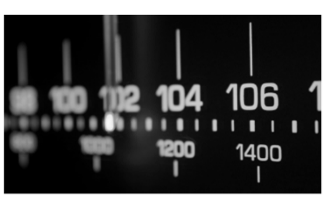
EVERYONE'S FAVORITE RADIO STATION



WIIFM

What do you need to get from people so you can give them what they want?

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COST OF INTERRUPTIONS

Stress … …stake, increased rework, longer hours, more frustration

*Multi-Tasking Myth Exercise

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TURN OFF EMAIL AND TEXT ALERTS

Cortisol addiction

Hour or 2 daily

Try it for two days

Search YouTube to learn how

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PHONE INTERRUPTIONS

Establish timeframe at the front end of each interaction

Try putting phone on DND

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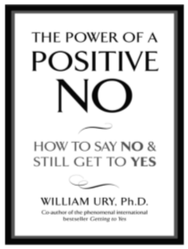
THE HEALTHY NO

What to Say No To

- Doubling up on meetings
- Perpetuating bad practices
- Fixing other people's mistakes
- Their crises
- Scope creep

How to Say No

- Acknowledge request first: "That's not something we're able to accommodate now"
- Then offer what you CAN do
- "We'd be able to get to that in __ days/weeks"



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8 CULTIVATE AWARENESS & MINDFULNESS

- Personality Style
- Emotional intelligence
- Resistance to change M.O.
- Mindset, Skills, Routines, Minute-by-Minute Choices

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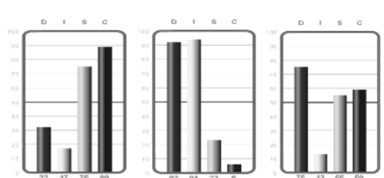
KNOWING SELF & OTHERS

DISC Style Indicator

- Drive
- Influence
- Steadiness
- Compliance



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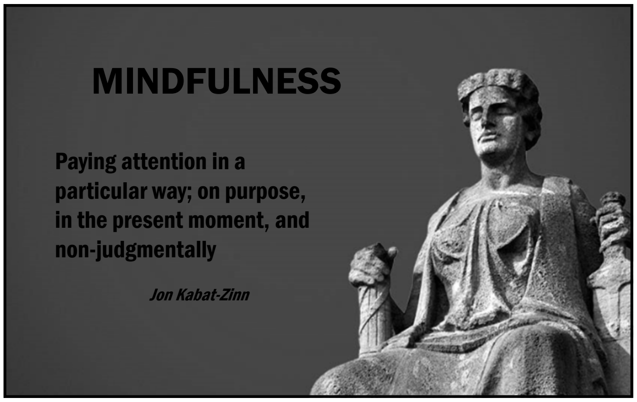
MINDFULNESS
Paying attention in a particular way; on purpose, in the present moment, and non-judgmentally
Jon Kabat-Zinn

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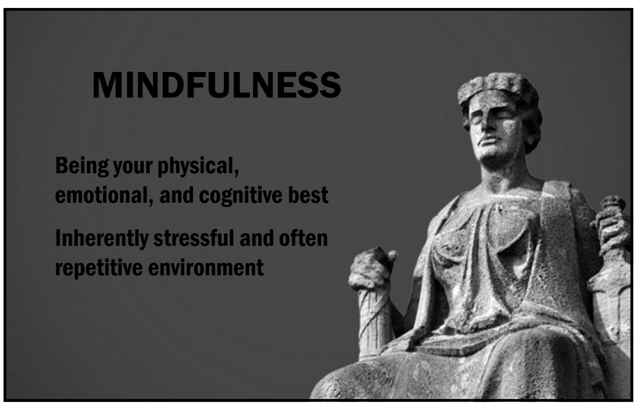
MINDFULNESS
Being your physical, emotional, and cognitive best
Inherently stressful and often repetitive environment

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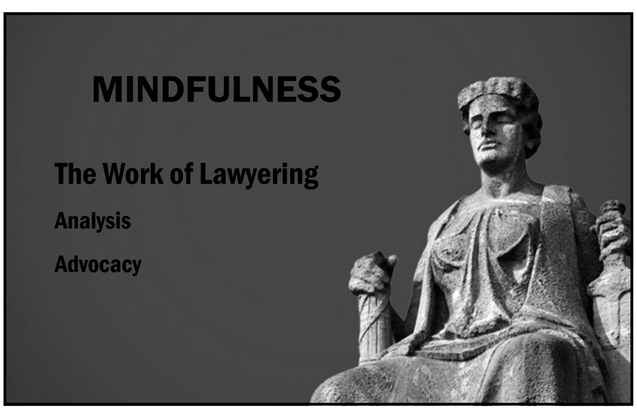
MINDFULNESS
The Work of Lawyering
Analysis
Advocacy

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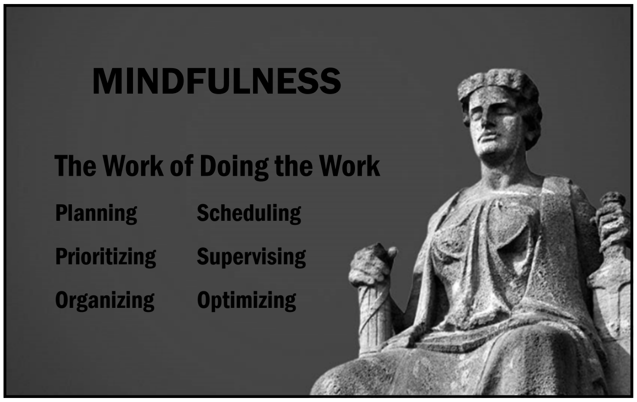
MINDFULNESS
The Work of Doing the Work
Planning
Scheduling
Prioritizing
Supervising
Organizing
Optimizing

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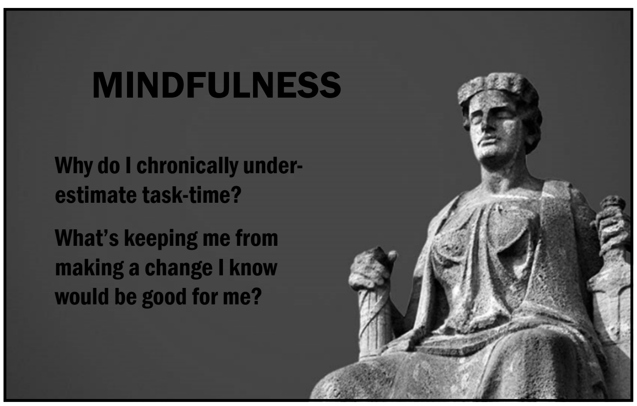
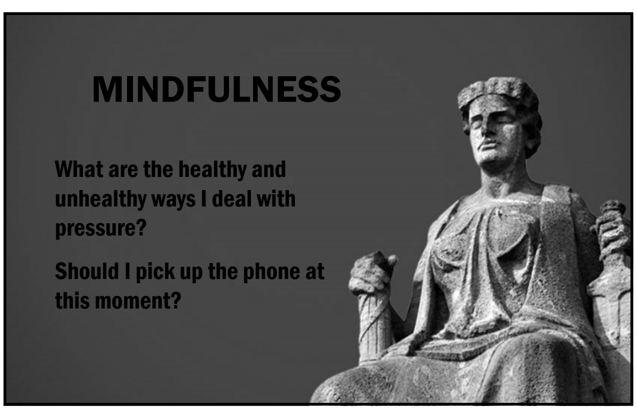
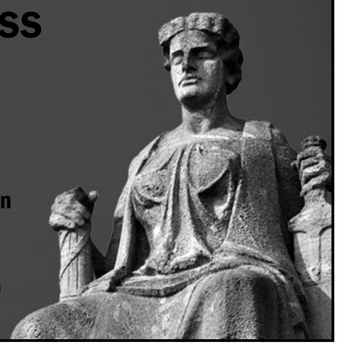

MINDFULNESS
Why do I chronically under-estimate task-time?
What's keeping me from making a change I know would be good for me?

77


MINDFULNESS
What are the healthy and unhealthy ways I deal with pressure?
Should I pick up the phone at this moment?

78

MINDFULNESS



Techniques

- 3 Deep breaths
- 1-minute breath meditation
- 1-minute body scan
- Apps (Insight Timer, Calm)

79

THE EIGHT ELEMENTS

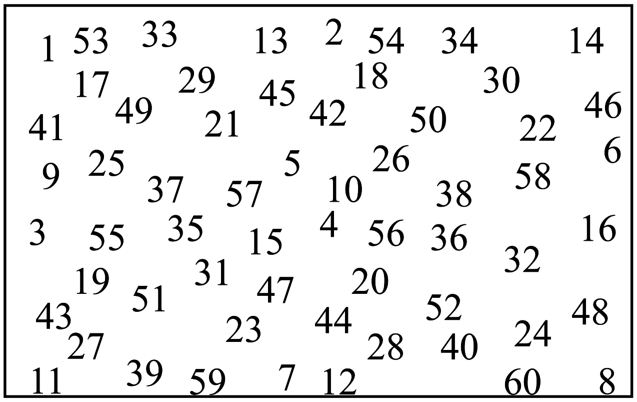
1. Plan Effectively
2. Capture & Update Tasks
3. Prioritize & Schedule
4. Delegate & Supervise
5. Organize Info
6. Optimize Procedures
7. Frame Expectations
8. Cultivate Awareness

80

FIVE FROGS WERE SITTING. . .

Wish — Want — Intend — Commit — Act — Persevere — Achieve

81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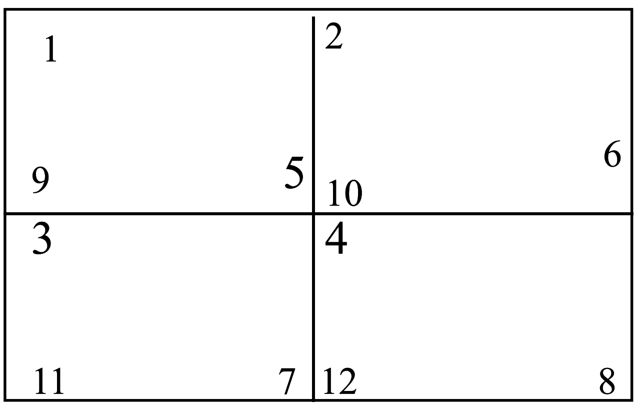
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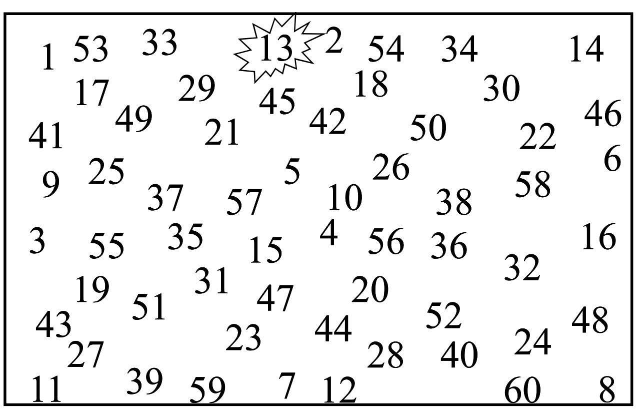
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27 23 44 24
28 40
11 39 59 7 12 60 8

84

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85

Top 25 Productivity Roadblocks

Adapted from *The Time Trap*, Alec Mackenzie, 1990, American Management Association

Name ____________________________________ **Date** __________

1. Management by crisis
2. Telephone interruptions
3. Attempting too much
4. Drop-in visitors
5. Email overload
6. Ineffective delegation
7. Disorganized desk and office
8. Lack of self-discipline
9. Inability to say No
10. Procrastination
11. Ineffective meetings
12. Administrative paperwork
13. Leaving tasks unfinished
14. Inadequate number of staff
15. Inadequate training of staff
16. Surfing the Web
17. Socializing
18. Confused responsibility or authority
19. Poor communication
20. Inadequate controls and progress reports
21. Incomplete Information
22. Unnecessary travel
23. Inadequate technology
24. Inadequate knowledge of software
25. Perfectionism

Instructions:

1. Circle the top FIVE roadblocks that hinder your overall productivity/effectiveness.
2. Then, rank order your selections from 1-5, with 1 being the most consequential.

Want to debrief your results and improve your time management? Call to learn about the 90-minute **Productivity Consult**.

203.876.8999

www.SuccessTrackESQ.com

TIME MANAGEMENT & PRODUCTIVITY SELF-ASSESSMENT

PART ONE

Score each the following statements as follows:

1 = Never or rarely; not true
2 = Sometimes; sometimes true
3 = inconsistently; intermittently true
4 = Most of the time; largely true
5 = Always; definitely true

Name

Title

Date

	SECTION ONE: DESIRED RESULTS	SCORE (1-5)
1.	I have *specific, measurable* goals in writing that describe what I am working to accomplish in my practice in the current year and for the next year	
2.	I do not spend, on a routine basis, more time working in the evenings, on the weekends and during vacation than I want to or feel I should	
3.	I know the gross fee income I must collect (or be responsible for generating) in my practice to meet my minimum take-home revenue target given my comp formula	
4.	I am clear about what I need to do to improve the non-financial satisfaction I derive from working in my practice	
5.	Overall, I believe it is *possible* to for me to become much more effective at managing time and workflow, even if I don't yet know how to do it	
	TOTAL	

	SECTION TWO: PLANNING	SCORE (1-5)
1.	I follow a daily routine in which I isolate uninterrupted time to focus on planning the upcoming day and week	
2.	I review my calendar of scheduled commitments (i.e., items already on my calendar) each morning for the current day and for the next two business days	
3.	I proactively reschedule previously calendared items with sufficient notice to the parties involved when I see that my schedule is going to get too congested	
4.	I devote extra time on Friday afternoon, the weekend, or on Monday morning to analyze the week ahead and adjust my activities accordingly	
5.	I have time scheduled on my calendar to plan monthly, quarterly and annual goals, and I keep those appointments with myself (and my team, if applicable)	
	TOTAL	

SECTION THREE: ORGANIZATION		SCORE (1-5)
1.	My desk is free of clutter and I use the right furniture to store my files, books, notebooks, etc	
2.	The only files in my office are those I'm actively working on or will be working on within one week; all other files are removed from my office and easily retrievable	
3.	Our document management software and filing system are set up properly and I know how to use them well; I/we spend little time looking for documents	
4.	I use rules, filters and subfolders to keep my email organized	
5.	I keep multitasking to an absolute minimum in order to focus on one thing at a time	
	TOTAL	

SECTION FOUR: CAPTURING & REVIEWING TASKS		SCORE (1-5)
1.	I use an effective system to capture my "to-do's" so I don't worry about having to remember too many things in my head	
2.	I think about and compose my to-do's as specific "next actions" rather than ideas, projects, or even file names	
3.	My system allows me to easily categorize different types of tasks (e.g., legal assignments, client contact, team meetings, administrative, personal)	
4.	I review my to do's as part of my daily and weekly planning and keep my lists updated regularly	
5.	My system includes an organized way to capture phone calls and emails that I need to initiate or respond to, and which I use in my daily planning	
	TOTAL	

SECTION FIVE: PRIORITIZING & SCHEDULING		SCORE (1-5)
1.	I have a clear thought process for deciding what I must accomplish for the day given the amount of "white space" (unscheduled time) on my calendar	
2.	I have recurring activities (e.g., staff and workgroup meetings, communications time) blocked off on my calendar and on my admin's calendar	
3.	Each morning, I block out specific times on my calendar to work on specific tasks	
4.	I accurately estimate how much time a particular "next action task" is going to take – or how much time I will devote to it on a given day	
5.	At least once each week, I choose to work on, and schedule time for, capacity-building tasks that are "important but not urgent" (e.g., upgrading my tech skills)	
	TOTAL	

SECTION SIX: DELEGATING & SUPERVISING		**SCORE (1-5)**
1.	I do not take on (or hold on to) work or tasks that someone else could and should do	
2.	I provide specific instructions for each task I delegate including the specific deliverable, the deadline, communication expectations, and progress check-ins	
3.	I invest time and resources to build the capacity of my team so I can confidently delegate more to them and keep just the work that only I can truly do	
4.	I provide delegatees with specific and timely feedback (both reinforcing and corrective) – and solicit their input on process improvement -- on a regular basis	
5.	I have an effective system for tracking all the tasks that I delegate and for coordinating multiple team member inputs to any one assignment	
	TOTAL	

SECTION SEVEN: OPTIMIZING PROCEDURES & SYSTEMS		**SCORE (1-5)**
1.	We periodically examine and upgrade the workflow of our most common *legal matters* and capture them in checklist or flowchart form	
2.	We periodically examine and upgrade the workflow of our most common *administrative processes* and capture them in checklist or flowchart form	
3.	My staff and colleagues are incentivized with specific rewards to make our procedures and systems more efficient and effective	
4.	Our hardware and software is configured properly and is rarely problematic	
5.	I/we actively support our personnel in developing their knowledge and skills to become increasingly efficient with our technology	
	TOTAL	

SECTION EIGHT: MANAGING EXPECTATIONS		**SCORE (1-5)**
1.	I pre-empt problems with clients and colleagues via frequent conversations that define assignment expectations; there are few complaints about delays	
2.	I communicate clearly with clients and colleagues when the number of assignments outpace the resources and time available to handle them	
3.	I comfortably reframe expectations for when and how long I will be available when someone's interruption or tardiness threatens to throw me off my schedule	
4.	I do not allow unnecessary interruptions, and I model appropriate boundaries and standards by not interrupting others, being on time, being prepared for meetings, etc	
5.	My staff and colleagues have confidence that my calendared schedule for any given day accurately reflects my commitments and availability	
	TOTAL	

SECTION NINE: KNOWING & GROWING YOURSELF

1.	I understand my personality and work-style preferences and how they shape my efficiency and effectiveness, and how they impact my interactions with others	
2.	I know my strengths and weaknesses and consciously leverage my strengths, and put in place support to compensate for my weaknesses	
3.	I am aware of the values that drive me and the personal goals I aspire to, and I intentionally align my approach to my work with those values and goals	
4.	I have successful strategies for recognizing and overcoming tendencies that hamper my effectiveness such as adrenaline addiction or procrastination	
5.	I actively cultivate improved mental, emotional, and physical health, and work-life balance	
	TOTAL	

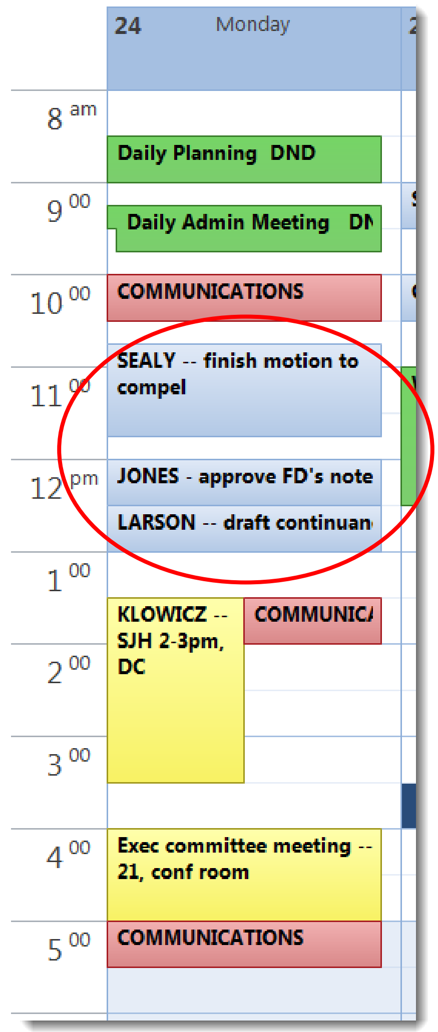
Now, add up your totals from each section and enter then in the center column, below.

STEP	Your Score	Mastery
1. Desired Results		**25**
2. Planning		**25**
3. Organization		**25**
4. Capturing Tasks		**25**
5. Prioritizing & Scheduling		**25**
6. Delegating		**25**
7. Optimizing Systems		**25**
8. Managing Expectations		**25**
9. Knowing and Growing Yourself		**25**
TOTAL		**225**

Daily Planning Checklist

Before you launch into work, start your day with up to 30 minutes of **focused, uninterrupted planning time.**

1. Review your calendar for the day to determine your **free space** for the day (i.e., your open, unscheduled time as of that morning; from 9:45 to 1:30 in the example to the right)
2. Block in Communications and Admin Meeting time
3. Review your written Task List
4. Select the most important 1 to 3 items from your To-do list to tackle in the day's open time
5. Determine the scope of each item, and realistically project how much time you will devote to each
6. Schedule blocks of time for each item and enter those blocks in your calendar; use accurate descriptions
7. Scan the rest of the week and the following week for calendared commitments
8. Determine and execute any adjustments that need to be made to your calendar for the current and following week given your already-scheduled commitments



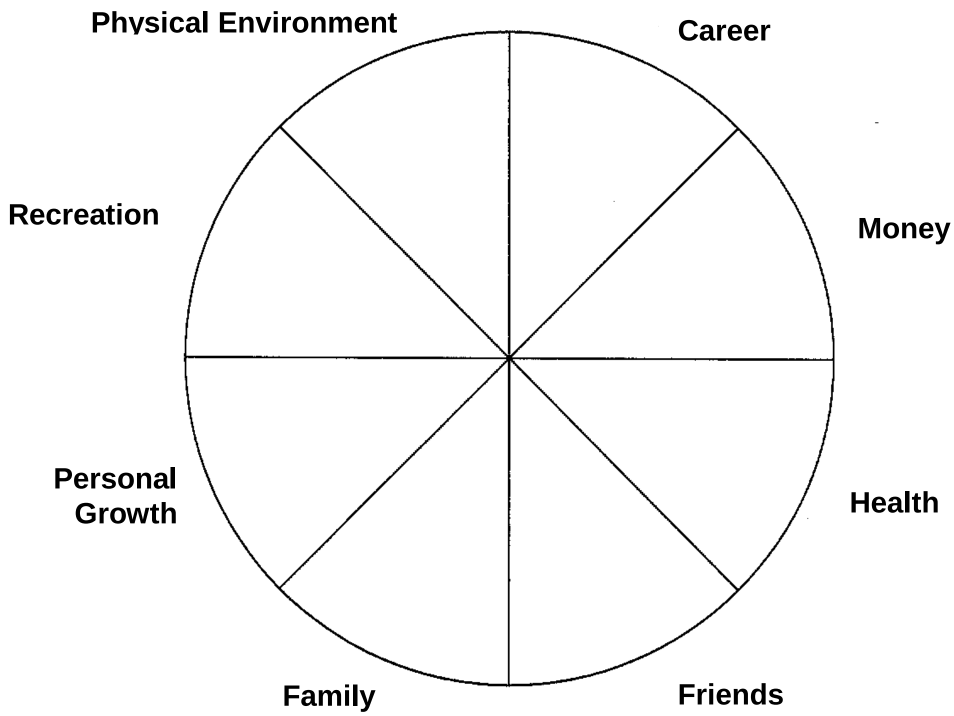
Also, check to see whether:

- staff will be at full strength and adjust your daily plan accordingly
- there is any pre-emptive communication with clients, staff or colleagues you should initiate given your objectives for the day
- you have any vacation or personal time coming up for which you need to plan accordingly

Wheel of Life Exercise

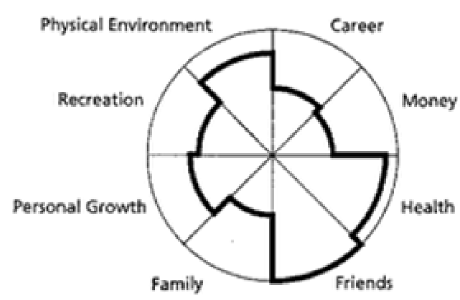
Name ______________________________

Date ___________________



Directions: Regarding the center of the wheel as 0 (not satisfied at all) and the outer edge as 10 (fully satisfied), rank your level of satisfaction with each area of your life by drawing a curved line across each section to create a new outer edge (see example). The new perimeter of the circle depicts your current state of balance – and where to focus to improve your overall wellbeing.

Example



From Co-Active Coaching: New Skills for Coaching People Toward Success in Work and Life, by Laura Whitworth, Henry Kimsey-House, and Phil Sandahl, (C) 1998. Used by permission.

Task Duration Estimate Log

Directions:
1. Prior to starting each discreet task, determine specifically what you intend to accomplish prior to moving on to another task.
2. Estimate how long you think it will take to accomplish whatever you intend to accomplish on the task.
3. Note the start time, and the estimated end time based on your answer from step 2.
4. Note the actual time you stop working on that task.

Date	Start Time	Task	Estimated End Time	Actual End Time

The Steps of Successful Delegation

http://www.businessballs.com/delegation.htm#steps

1 Define the task
Confirm in your own mind that the task is suitable to be delegated. Does it meet the criteria for delegating?

2 Select the individual
What are your reasons for delegating to this person? What are they going to get out of it? What are you going to get out of it?

3 Assess ability and training needs
Is the other person capable of doing the task? Do they understand what needs to be done? If not, you can't delegate.

4 Explain the reasons
You must explain why the job or responsibility is being delegated. And why to that person? What is its importance and relevance? Where does it fit in the overall scheme of things?

5 State required results
What must be achieved? Clarify understanding by getting feedback from the other person. How will the task be measured? Make sure they know how you intend to decide that the job is being successfully done.

6 Consider resources required
Discuss and agree what is required to get the job done. Consider people, location, premises, equipment, money, materials, other related activities and services.

7 Agree deadlines
When must the job be finished? Or if an ongoing duty, when are the review dates? When are the reports due? And if the task is complex and has parts or stages, what are the priorities?
At this point you may need to confirm understanding with the other person of the previous points, getting ideas and interpretation. As well as showing you that the job can be done, this helps to reinforce commitment. Methods of checking and controlling must be agreed with the other person. Failing to agree this in advance will cause this monitoring to seem like interference or lack of trust.

8 Support and communicate
Think about who else needs to know what's going on, and inform them. Involve the other person in considering this so they can see beyond the issue at hand. Do not leave the person to inform your own peers of their new responsibility. Warn the person about any awkward matters of politics or protocol. Inform your own boss if the task is important, and of sufficient profile.

9 Feedback on results
It is essential to let the person know how they are doing, and whether they have achieved their aims. If not, you must review with them why things did not go to plan, and deal with the problems. You must absorb the consequences of failure, and pass on the credit for success.

The seven levels of delegation

Delegation isn't just a matter of telling someone else what to do. There is a wide range of varying freedom that you can confer on the other person. The more experienced and reliable they are then the more freedom you can give. The more critical the task then the more cautious you need to be about extending a lot of freedom, especially if your job or reputation depends on getting a good result. Take care to choose the most appropriate style for each situation.

1 "Wait to be told." or "Do exactly what I say."

No delegation at all.

2 "Look into this and tell me what you come up with. I'll decide."

This is asking for investigation and analysis but no recommendation.

3 "Give me your recommendation, and the other options with the pros and cons of each. I'll let you know whether you can go ahead."

Asks for analysis and recommendation, but you will check the thinking before deciding.

4 "Decide and let me know your decision, but wait for my go ahead."

The other person needs approval but is trusted to judge the relative options.

5 "Decide and let me know your decision, then go ahead unless I say not to."

Now the other person begins to control the action. The subtle increase in responsibility saves time.

6 "Decide and take action, but let me know what you did."

Saves more time. Allows a quicker reaction to wrong decisions, not present in final level.

7 "Decide and take action. You need not check back with me."

The most freedom that we can give to the other person. A high level of confidence is necessary, and needs good controls to ensure mistakes are flagged.

The Delegation Contract

Variously called 'contracts' or 'psychological contracts' or 'emotional contracts', these expressions describe the process of agreeing with the other person what they should do and the expectations linked to the responsibility. It all basically means the same, whatever you call it. The point is that people cannot actually be held responsible for something to which they've not agreed. The point is also that everyone is more committed to delivering a responsibility if they've been through the process of agreeing to do it. This implies that they might have some feelings about the expectations attached, such as time-scale, resources, budget, etc., even purpose and method. You must give the other person the opportunity to discuss, question and suggest issues concerning expectations attached to a delegated task. This is essential to the contracting process.

Meeting Checklist

Meeting Date ___________________________

Attendees ____

Location ____

- ☐ Have a specific WRITTEN agenda/purpose for the meeting
- ☐ Start and end the meeting on time
- ☐ Who will be taking notes on the meeting (including discussion, commitments, etc)?
- ☐ What decisions have been made?
- ☐ What actions/activities have been committed to?
- ☐ By whom?
- ☐ What are the specific, concrete deliverables?
- ☐ How will the deliverable be communicated/delivered?
- ☐ When and where will it be delivered?
- ☐ How will commitments be monitored?
- ☐ When and where is the next meeting (or other follow up)?

NOTE: Review the check list and mark each box as completed before ending the meeting

Discussion Notes

Commitments (everyone's; not just yours)

Deliverables (everyone's; not just yours)

Pareto's Principle - The 80-20 Rule

This article details the origin of the 80-20 rule, and quotes a variety of applications for it in modern business.
Used by permission.

By: Arthur W. Hafner, Ph.D.

Vilfredo Pareto (1848-1923) was an Italian economist who, in 1906, observed that twenty percent of the Italian people owned eighty percent of their country's accumulated wealth. Over time and through application in a variety of environments, this analytic has come to be called Pareto's Principle, the 80-20 Rule, and the "Vital Few and Trivial Many Rule." Called by whatever name, this mix of 80%-20% reminds us that the relationship between input and output is not balanced. In a management context, this rule of thumb is a useful heuristic that applies when there is a question of effectiveness versus diminishing returns on effort, expense, or time.

The Rule and Its Corollary

Pareto's rule states that a small number of causes is responsible for a large percentage of the effect, in a ratio of about 20:80. Expressed in a management context, 20% of a person's effort generates 80% of the person's results. The corollary to this is that 20% of one's results absorb 80% of one's resources or efforts. For the effective use of resources, the manager's challenge is to distinguish the right 20% from the trivial many.

Practical Applications

Some examples about the allocation of time, effort, and resources are the following:

- Costs. To reduce costs, identify which 20% are using 80% of the resources. If members of this segment are not top profit generators, consider charging them for the resources they consume or shift services away from this sector.

- Personal Productivity. To maximize personal productivity, realize that 80% of one's time is spent on the trivial many activities. Analyze and identify which activities produce the most value to your company and then shift your focus so that you concentrate on the vital few (20%). What do you do with those that are left over? Either delegate them or discontinue doing them.

- Product Mix. Marketers and advertisers engage in market segmentation by identifying groups of people/organization with shared characteristics and then aggregate these groups into larger market segments. This segmentation may be behavioristic, demographic, geographic, or psychographic. The rule predicts that 80% of the profits are derived from 20% of the segments. If costs are allocated to segments and the segments are then rank-ordered by profit, overall profits will increase if the less profitable segments are discontinued, sold, or traded.

- Profits. To increase profits, focus attention on the vital few (top 20%) by first identifying and ranking customers in order of profits and then focusing sales activities on them. The 80-20 Rule predicts that 20% of the customers generate 80% of the revenues, and 20% yield 80% of the profits, but these two groups are not necessarily the same 20%.

More Examples of the 80-20 Rule:

80% of a manager's interruptions come from the same 20% of the people

80% of a problem can be solved by identifying the correct 20% of the issues

80% of advertising results come from 20% of your campaign.

80% of an equipment budget comes from 20% of the items

80% of an instructor's time is taken up by 20% of the students

80% of benefit comes from the first 20% of effort

80% of customer complains are about the same 20% of your projects, products, services.

80% of network traffic stays within the LAN while 20% needs to cross the backbone.

80% of our personal telephone calls are to 20% of the people in our address book .

80% of our shipments utilize 20% of your inventory.

80% of sales time is spent on 20% of the customers, who may not be the profitable 20%

80% of the decisions made in meetings come from 20% of the meeting time

80% of the outfits we wear come from 20% of the clothes in our closets and drawers

80% of the traffic in town travels over 20% of the roads

80% of what we produce is generated during 20% of our working hours

80% of your annual sales come from 20% of your sales force

80% of your future business comes from 20% of your customers

80% of your growth comes from 20% of your products

80% of your innovation comes from 20% of your employees or customers

80% of your profits come from 20% of your customers

80% of your staff headaches come from 20% of our employees

80% of your success comes from 20% of your efforts

80% of your website traffic comes from 20% of your pages

From studying these examples of the 80-20 Rule, managers in both profit and not-for-profit enterprise can increase their effective and efficient use of resources by analyzing the inputs required to produce the outputs that they experience.

Final Thought: The 20-20-60 Rule

When I began my librarian career as an administrator in higher education, the dean to whom I reported told me that there was a rule of thumb that had served him well. It was the 20-20-60 Rule, a special case of 80-20 Rule that he applied to a wide variety of problems and situations. His rule was that 20% of most prospects are avid supporters and 20% are avidly not supporters. The persons in these two 20% tails are basically fixed and no amount of persuasion will change their view or attitude. Prospects in the remaining 60% are persons who are interested but need to be convinced or "sold." Application of the 20-20-60 Rule means that our outcome is best if we focus on the 60% group by answering their concerns, doubts, and questions. The persons in the 60% group are the ones who most likely will become our clients and customers.

Dr. Hafner currently serves as Dean of University Libraries at Ball State University in Muncie, IN. His research of Pareto’s Principle continues and future observations will be included in the Fundraising Free Press. Dr. Hafner can be reached at ahafner@bsu.edu.

Top 12 Keyboard Shortcuts for Lawyers

Most people are familiar with holding down the Ctrl key and pressing C to copy selected text, and Ctrl V to paste that text somewhere else. And many use keyboard shortcuts to format text, such as Ctrl B to make selected text bold. And of course, hitting Ctrl S (to save your work) is – or should be – a frequent, automatic behavior. Another other commonly use shortcut is Ctrl A, to select everything in the current window.

But there are dozens of lesser known keyboard shortcuts that will make a BIG difference in your efficiency and save you hundreds of hours over time. Here are 12 of them, including several that are particularly useful to boosting your productivity as an attorney.

(These are for Windows and will work for most applications. Mac users have the same functionality, but you may have to search for "Mac keyboard shortcuts" to get the correct keystroke combinations.)

PRINT PAGE TWO OF THIS DOCUMENT FOR A LIST TO TAPE TO THE SIDE OF YOUR MONITOR

Switch between open items (programs, windows) and your desktop. Great for navigating between items when you have several items open and/or minimized at once: **Alt Tab**

Find text within the open window (works in browsers too): **Ctrl F**

Split the screen so you can keep one section of a document visible while scrolling through or working on another part. Make sure to try this one; it's great: **Ctrl Alt S**

Insert date; great for phone call notes, etc: **Alt Shift D** (Alt Shift T inserts the time)

Spell check: **F7**

Bring up a thesaurus with synonyms for the highlighted word: **Shift F7**

Toggles case between all caps, all lower case, and mixed case; great for legal docs; great for fixing text you've accidentally typed with caps lock on: **Shift F3**

Converts text to small caps (great for citations): **Ctrl Shift K**

Insert footnote automatically (and keeps them numbered correctly): **Ctrl Alt F**

Undo the previous action; when you want to undo a move, a formatting action, etc: **Ctrl Z**

Redo the previous action: **Ctrl Y**

Switch between open items = **Alt Tab**

Find text in the open window = **Ctrl F**

Split the screen = **Ctrl Alt S**

Date insert = **Alt Shift D**

Time insert = **Alt Shift T**

Spell check = **F7**

Thesaurus = **Shift F7**

Toggles case = **Shift F3**

Convert text to small caps = **Ctrl Shift K**

Footnote insert = **Ctrl Alt F**

Undo previous action = **Ctrl Z**

Redo previous action = **Ctrl Y**

Microsoft Outlook for Legal Professionals

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Microsoft Outlook for Legal Professionals

Microsoft Outlook for Legal Professionals

I. EMAIL OVERLOAD

Most current studies indicate that lawyers receive around 120 and send roughly 40 emails per day.[1] Without question, email is one of the most important technological communication advancements of the past 100 years. It has fundamentally changed the way we communicate with clients and do business. Major corporations and law firms are run via email communication instead of face-to-face communication.

For lawyers, emails present a wide array of issues that most of the business world and ordinary consumers will never face. In this seminar, 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 email.

The first step to any problem is to understand the problems that exist. We must get our arms around all the email issues that face lawyers. The second step is to isolate each problem and tackle each problem, without forgetting how that might affect other email problems. For instance, controlling spam email 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.

II. MAIN EMAIL PROBLEMS

A. Torrent of Interruptions: In an eight (8) hour work day, if we receive 100 emails, that equates to receiving one email every 4.8 minutes. Sound familiar? It should, because that is the world most of us live in. Combine that with instant messages, phone calls and what I call email curiosity interruptions, that equates to one interruption every 2-3 minutes! What can you do to minimize the distraction?

[1] See https://www.templafy.com/blog/how-many-emails-are-sent-every-day-top-email-statistics-your-business-needs-to-know/

Take the following quick survey:

1. **Interruption Survey**:

   - Average number of Emails you get per day:..............................______
   - Average number of Instant messages per day: ....______
   - Average number of phone calls you get each day:.....................______
   - Average number of curiosity email or internet breaks each day: ....______
   - **Total Interruptions Per Day**.. ______

2. **Other Questions To Ask Yourself**:

   - How many times do you look at your email each day?..............______
   - What percentage of interruptions really need immediate attention?..______
   - Has technology simplified your life? ☐ Yes ☐ No
   - Is Technology the Slave or the Master? ☐ Yes ☐ No

B. **Email Storage**: What do we do with all of this email? There are several problems related to this:

- How should you archive old email?
- How do you deal with attachments and keep from losing them?
- How do you search for old conversations quickly and efficiently?
- How do you keep your email but not run out of server space? Why does the IT person keep telling you that you have too much email in your inbox and you're clogging up the server?

C. **Too Much Legitimate Email To Deal With Effectively**: Many people simply receive more email than they can read and keep up with. How do you sort, store and track all of this email?

D. **No Expectation of Privacy**: The old saying goes: You should never send an email that would embarrass you were it to appear on the front page of tomorrow's paper. Is there anything you can do to create an expectation of privacy?

E. **Spam Getting Through**: There are lots of ways to avoid SPAM, and yet it still manages to get into our mailboxes. What can you do about it?

F. **Are You Using Outlook Effectively?** Probably not. Although millions of people use Outlook, most do not use all of its functionality to their advantage. In this seminar, we'll give you some great tips for making better use of Outlook.

III. EMAIL STORAGE

A. Main Storage Problems:

1. **Disorganization**: Most people have hundreds or thousands of unrelated messages in their inboxes. This is equivalent to taking all of the paper out of your files and throwing it on the floor of the file room. The point is, if it's not organized, then it's mostly useless.

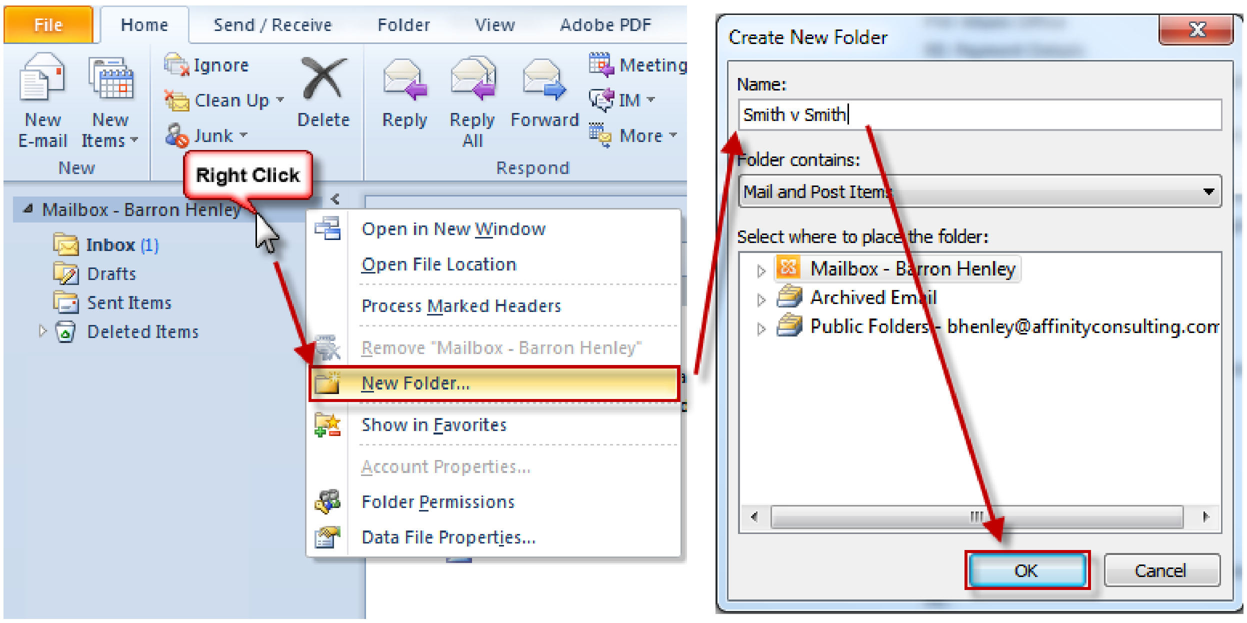
2. **Storage Space Limitations**: You may have been scolded by your IT folks about this. If you're using Microsoft Exchange on your server, then it can get overloaded with the quantity of emails and attachments you keep in your inbox and Outlook folder structures. If you don't have Exchange, then all of those emails (and contacts, and appointments and tasks) are stored in a PST file on your hard drive or the server. The bigger that database, the slower your computer will run. Of course, the database can also over-run your storage capacity.

3. **No One Else Can See Your Email But You**: In most cases, if you have an important client communication in Outlook, no one else in your office can see it. In many cases, lawyers want to share this information, but don't know how to do it.

4. **Difficulties Searching**: Many people complain that it's nearly impossible to efficiently search old emails for a particular conversation. What can you do to make this task easier?

B. **Start By Organizing Outlook**: Setting up folders and using Rules is a great way to start to organize your Outlook.

1. **How To Set Up a New Email Folder**: To Setup a new Subfolder in your Inbox, right-click the Inbox (or your mailbox) ➔ New Folder. Give it a name and make sure it will contain Mail and Post Items. Then click OK.

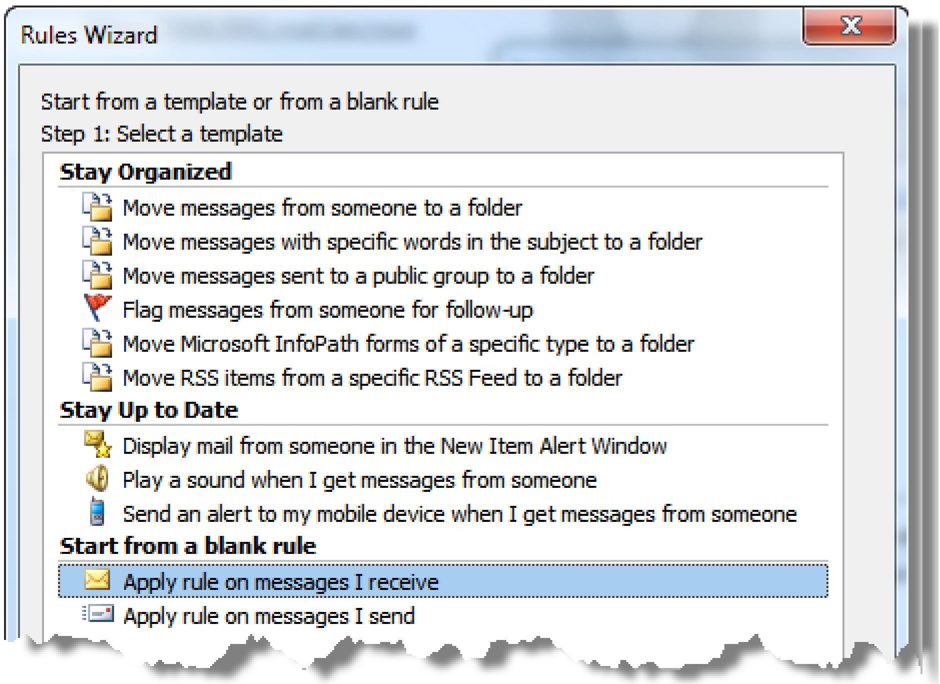


2. **Outlook Rules**: Rules allow you to auto-sort incoming email (among other things). Here's how you set one up:

- In <u>Outlook 2007</u>, click the Tools menu ➔ Rules and Alerts. In <u>Outlook 2010/13/16</u>, click the File menu ➔ Info ➔ Manage Rules and Alerts button.

- Click the **New Rule** button.

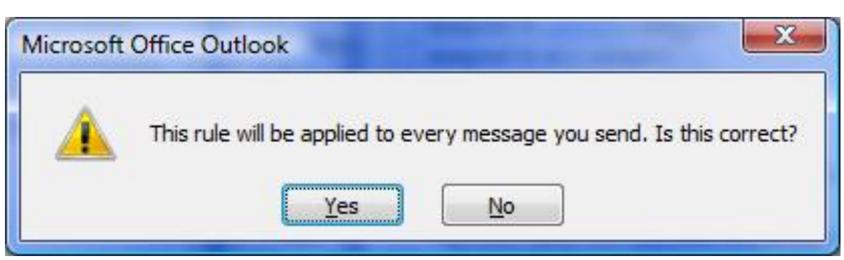
- Select Start from blank rule if you're using Outlook 2003 or prior. If you're using Outlook 2007, then choose the appropriate item from the list below:



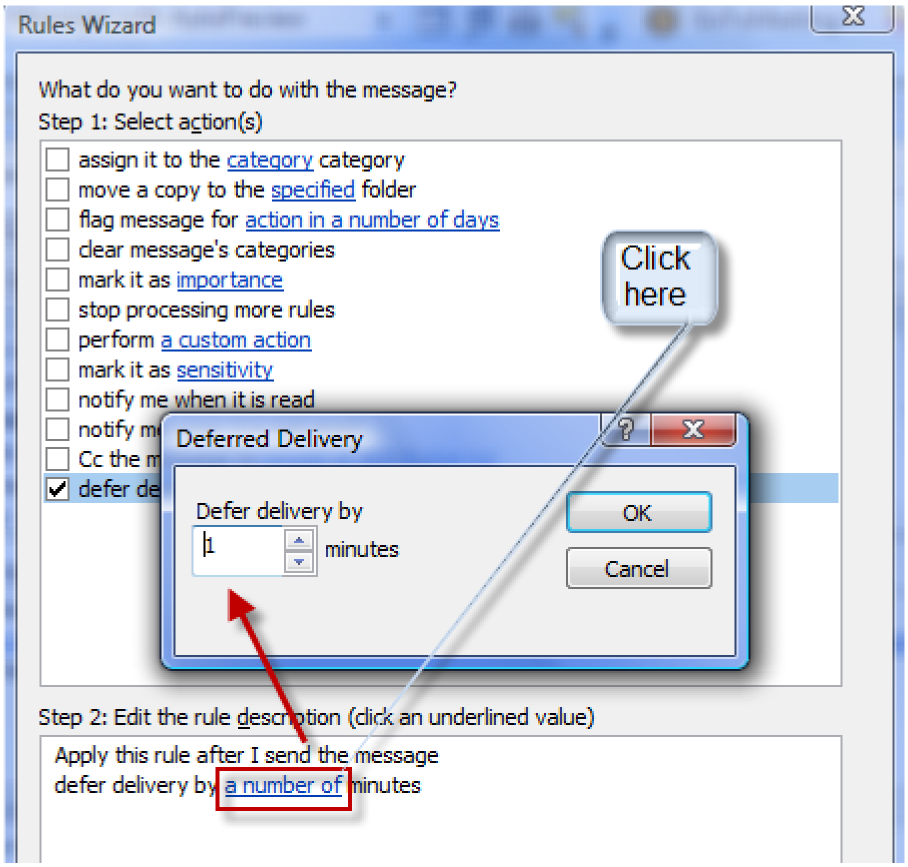
- Follow the steps for selecting the Condition, Action, Exceptions, then give it a name and make sure the rule is turned on!

3. **Sample Rule - Delay Sent Mail By One Minute** (in case you change your mind)

- In Outlook 2007, click the **Tools menu** → **Rules and Alerts**. In Outlook 2010/13/16, click the **File menu** → **Info** → **Rules and Alerts**.
- Click the **New Rule** button.
- Under "Start from a blank rule," choose "check messages after sending."
- On the next screen ("which conditions do you want to check"), don't check anything (you want this rule to apply to every email you send) and click the Next button at the bottom. You'll see the following dialog (click Yes):



- In the next screen, check "defer delivery by a number of minutes," and then click the hyperlink for "a number of" at the bottom of the screen and enter the number of minutes you want to delay your email.



- Click Next and add any exceptions (for people you don't want to delay email to).

- Click Next, name your rule Delay and click Finish.

4. **Sample Rule - Keep Track of Delegated Email**: Many people forward email to others to deal with but have a difficult time remembering what they delegated for follow up purposes. Here's a rule that will help.

- First, create a folder in Outlook called Delegated Email.

- In Outlook 2007, click the **Tools menu → Rules and Alerts**. In Outlook 2010/13/16, click the **File menu → Info → Rules and Alerts**.

- Click the **New Rule** button.

- Under "start from a blank rule," choose "check messages when they arrive" and click Next at the bottom of the dialog.

- Under "check which conditions do you want to check," check BOTH "from people or distribution list" and "where my name is in the CC box." At the bottom of the dialog, click the hyperlink for "people or distribution list" and add your email address. We're basically creating a rule that will look for emails from you and copied to you. Click Next.

- Under "what do you want to do with the message," choose "move it to the specified folder." Make the specified folder your Delegated Mail folder. Click Next and add any exceptions. Click Next, name it and click Finish.

C. **Outlook Add-On Programs To Help You Sort and Store Your Email**: There are many third-party programs that integrate with Outlook which can help you organize, sort and store your email (both incoming and outgoing). Here are a few to consider:

1. **SpeedFiler by Claritude**: See www.claritude.com.

2. **SimplyFile by TechHit**: See www.techhit.com/simplyfile. T

3. **Incoming Mail Organizer Add-In for Microsoft Outlook**: See http://www.sperrysoftware.com/Outlook/Incoming-Mail-Organizer.asp.

4. **NEO Pro**: See http://www.emailorganizer.com/

5. **Quick File for Outlook**: See http://www.standss.com/quickfile/

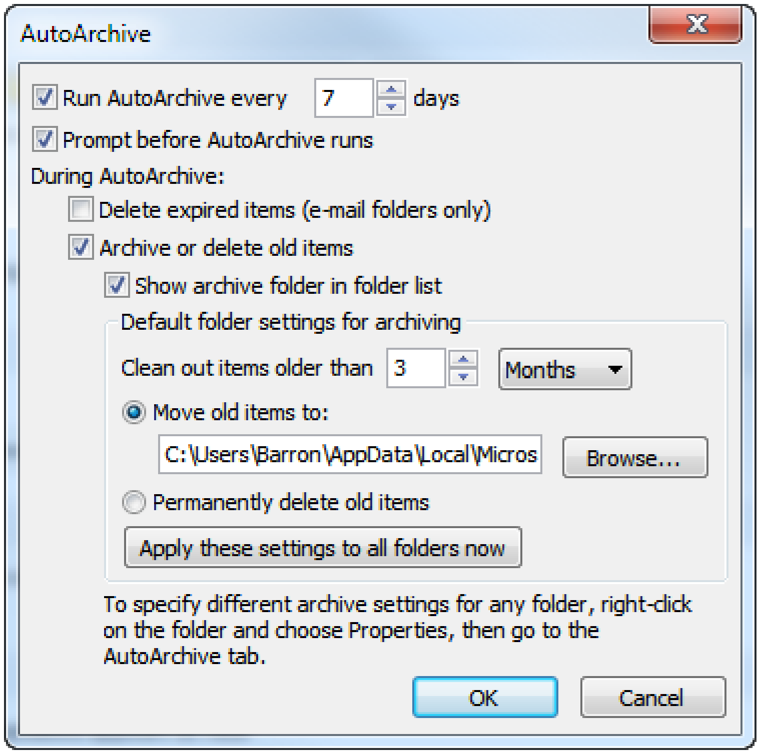
6. **Sanebox**: See http://www.sanebox.com/

7. **QuickFile4Outlook - Lawyers Edition**: See www.outlook4lawyers.com.

D. **Archiving Old Outlook Email**: Many Outlook users end up with an enormous accumulation of email in their Sent Mail and Deleted Mail folders. Furthermore, some mail is sorted into subfolders and forgotten about. All of this will start to bog down servers and PCs as those databases of emails get larger and larger. Thankfully, Outlook has an excellent way to dealing with this problem - AutoArchive. In a nutshell, AutoArchive will allow you to a) permanently delete expired items; b) delete or c) archive old items to an archive file (archived database). Conveniently, the first time AutoArchive runs, it creates the archive database for you. It is stored on the C:\ by default so you'll either want to move it to a server folder or back it up directly from your C:\. Once it has established itself, you'll see the Archive folder in your Outlook Folder List. There are two sets of AutoArchive settings: global settings and per-folder settings.

1. **Turn AutoArchive On or Off**. In Outlook 2007, click the Tools menu → Options → Other tab → click the AutoArchive button. In Outlook

2010/13/16, click the File menu → Outlook Options → Advanced (left side) → AutoArchive Settings button. At the top of the following dialog, you'll see "Run AutoArchive every __ days." If you uncheck that box, it will not run. As you can see from the following screen shot, you have many options for this:



Note that these are your default (global) AutoArchive settings.

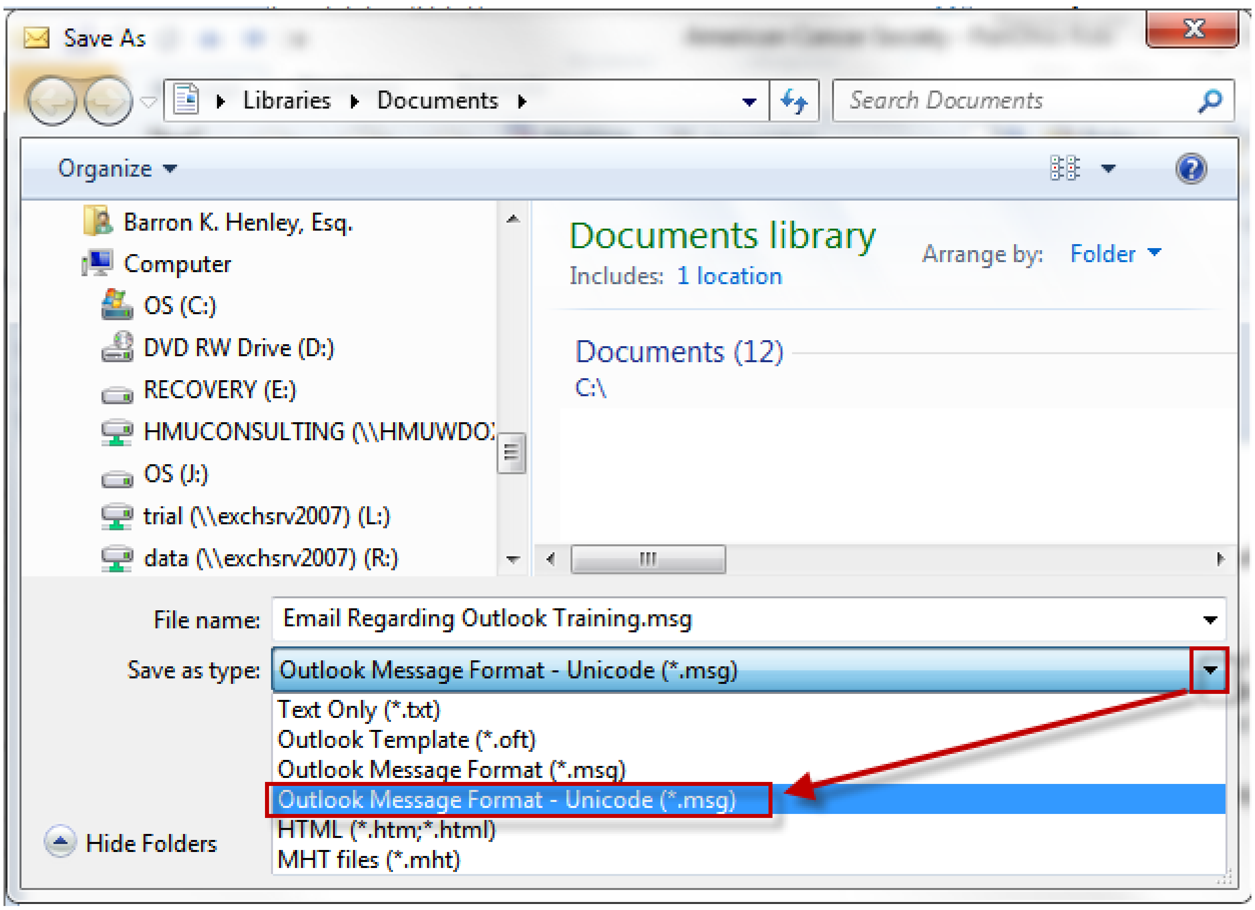
2. **Control the Archive Settings of a Specific Folder**: You can control what any particular folder does in Outlook by following these steps: Right-click the folder → choose Properties → click the AutoArchive tab → Make your changes and click OK.

E. **Saving Email Messages Outside of Outlook**: When an email message is in your Outlook inbox, it is just a record in a database and *not* a discreet document like a Word file. That fact is a big part of the problem associated with organizing and storing them. Email related to a particular matter is stored in one place; and word processor files related to that matter are stored somewhere else. However, you can create documents out of those emails and those documents can be stored with every other document related to a particular matter or issue.

1. **Saving Email As A Document**: The classic problem that law firms have if they do not own a document management system is saving and finding matter-specific email. Why? Because people (1) keep them in their individual inboxes, or (2) save them in subfolders within their own inbox

(which no one else has access to), or (3) delete the email altogether. Email is valuable correspondence that in most circumstances should be saved. However, in a law firm or legal department, it should not be saved within one's own individual inbox.

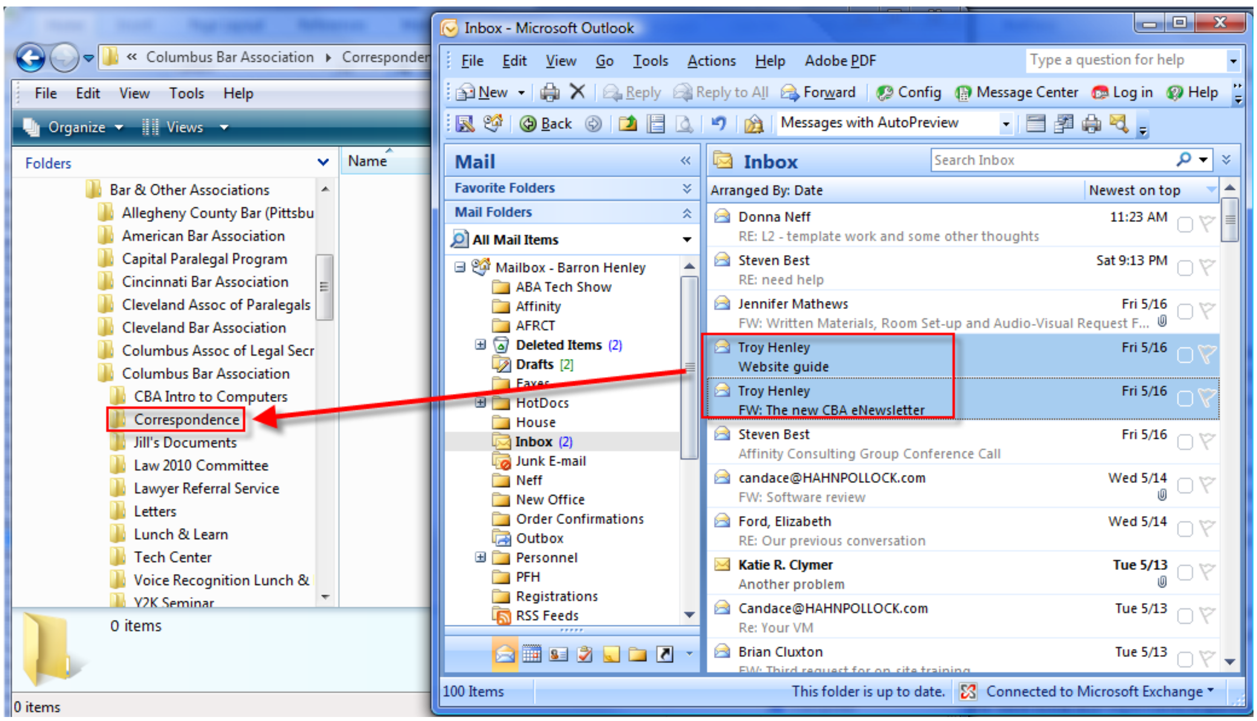
As it turns out, you can save email much like you save a Microsoft Word document clicking the File menu ➔ Save As (Outlook 2003 & 2010) OR Office Button ➔ Save As (Outlook 2007). We recommend that you save as **Outlook Message Format - Unicode (*.msg)**. If you're using Outlook 2003, it will default to HTML but you can switch to MSG. If you're using Outlook 2007 or 2010, it will default to MSG.



You may notice that you have a choice of Outlook Message Format and Outlook Message Format - Unicode. The Unicode format is the current standard for Outlook and holds support for international characters. The non-Unicode one saves msg-files in the ANSI format. The ANSI format is the only format that Outlook 2002 and previous can read. Outlook 2003 and later can read ANSI formatted and Unicode formatted msg-files. Dragging and dropping messages out of Outlook into an Explorer folder will by default save it in the Unicode format.

You can also save email as **Text Only** although you'll lose any formatting that was in the email. Saving as an MSG file will retain the original formatting, look and feel of the email.

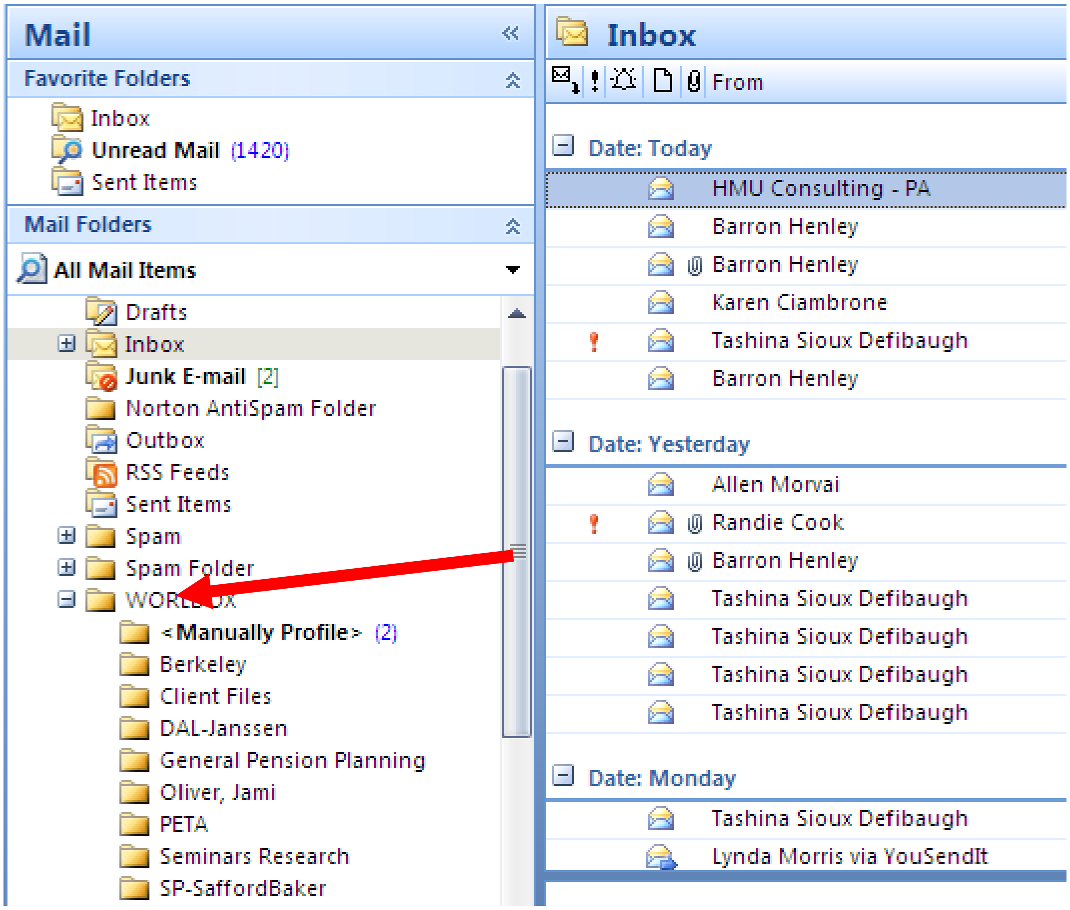
2. **Saving Email By Dragging Into a Windows Explorer Folder**: You can clean out your inbox or subfolders under your inbox by cascading the windows and simply dragging and dropping all of them into the desired folder. This will COPY the emails over into that folder, saving them automatically as MSG (native Outlook Message Format) files, which preserves the metadata and all attachments.



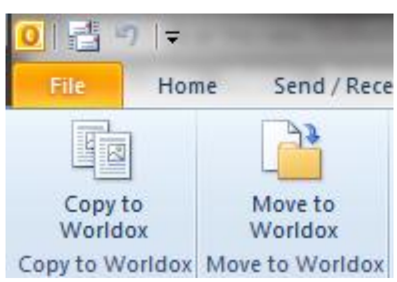
3. **Saving Email With Document Management Programs (DMS)**: While document management programs (Worldox, Interwoven Worksite, NetDocuments, etc.) were originally thought of as only word processing document repositories, that is no longer true. They can now hold just about any type of computer file (word processor, PDF, TIF, email, JPG, etc.).

4. **Worldox Example**: Using Worldox as an example, it provides 3 different ways to save emails (see below). Once profiled and saved, the emails are stored within the client/matter structure and easily searchable and accessible by anyone who uses the document management system (Worldox, in this case).. It's also important to note that you can save them one-at-a-time or large quantities of them all at once.

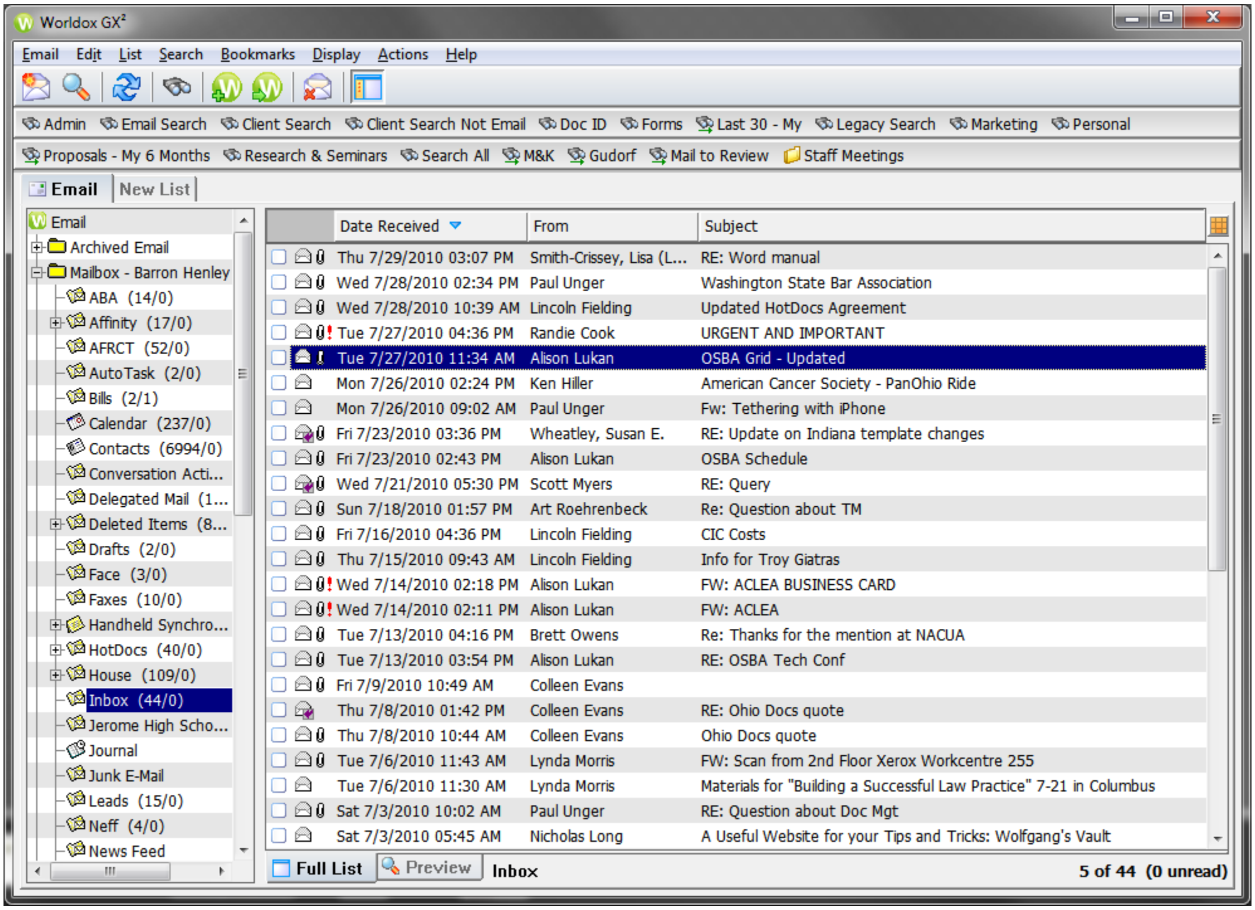
a. **Save Email From Within Outlook - Drag and Drop**: Saving to Worldox from within Outlook – Drag and Drop on the Worldox "folder" for a particular matter.



b. **Save Email From Within Outlook Using Worldox - Copy or Move Buttons**: The Worldox/Outlook integration also provides **Copy To Worldox** or **Move to Worldox** buttons (located in the toolbar region of Outlook). Simply select the email(s) you want to save into the system, then click the appropriate button shown below.

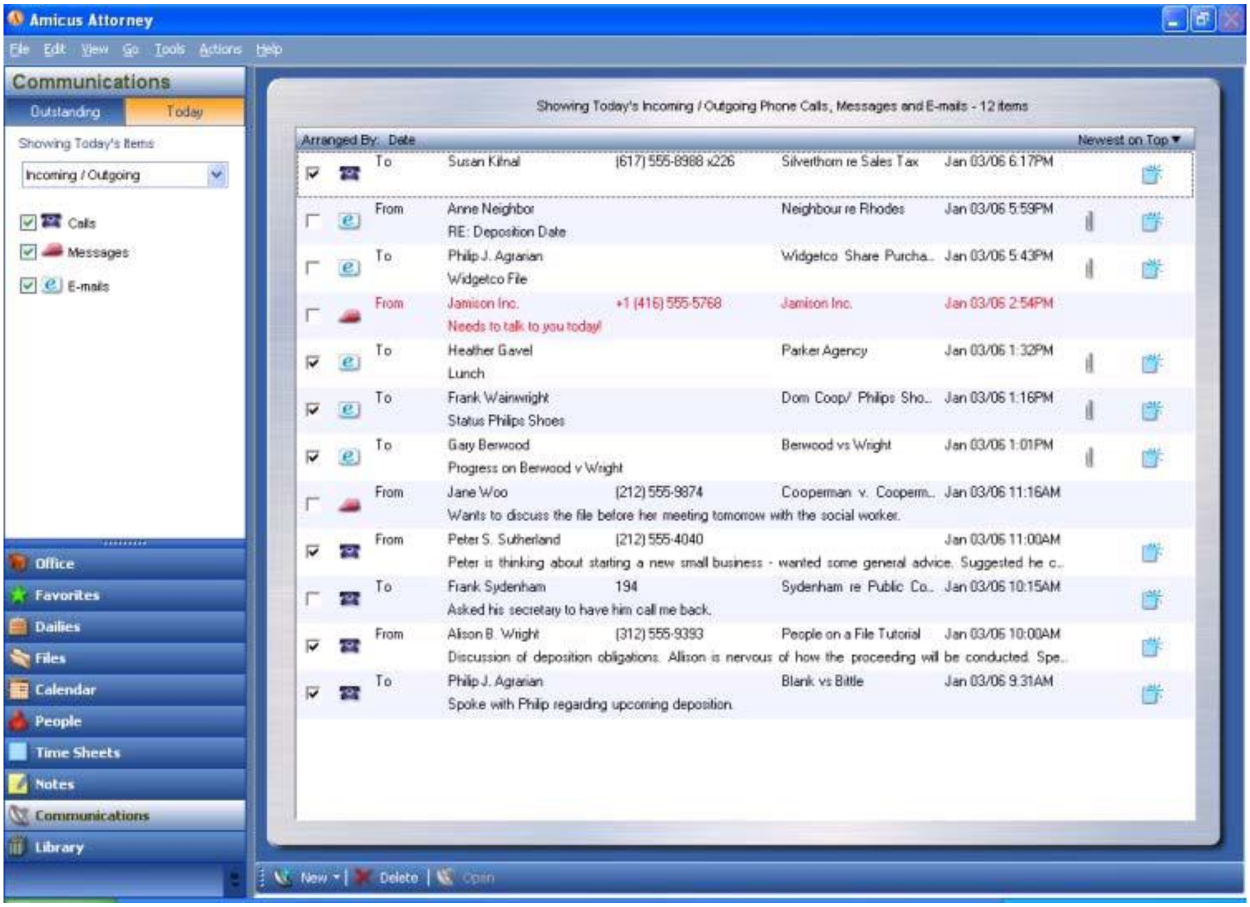


c. **Save Email From Within Worldox**: Saving email from the Worldox Email Tab which allows you to see your Outlook inbox from within Worldox.

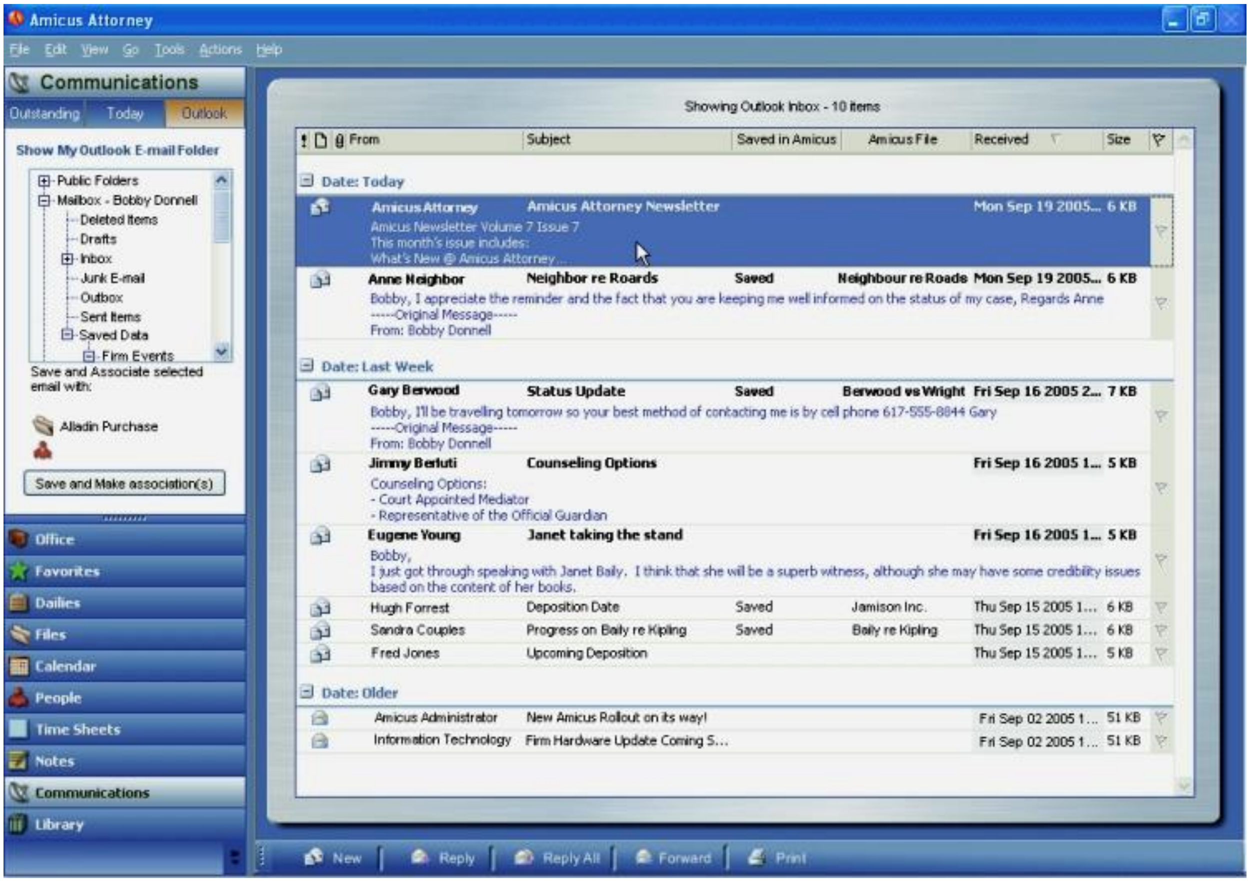


5. **Saving Email Using a Case/Practice Management Program**: This would include programs like Amicus Attorney, Time Matters, PracticeMaster, etc. If you have a case management program with Outlook integration, you can streamline the saving of email by saving them directly into the matter within the case management program. You can also auto-associate emails by setting up rules within the practice management program based on the sender.

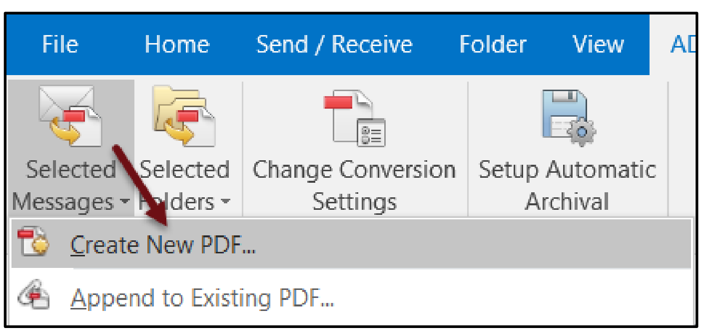
6. **Amicus Attorney Example**: The following is an example of the Amicus Attorney Communications area which allows you to save and manage email, messages and telephone slips:



This is the Outlook view from within Amicus Attorney. From this view, you can select an email and click on the **Save and Make Associations** button and it will save the email in the designated client/matter folder or contact card. The huge benefit to this is that you can see all relevant client information, documents and emails from ONE program. It is a very nice luxury.



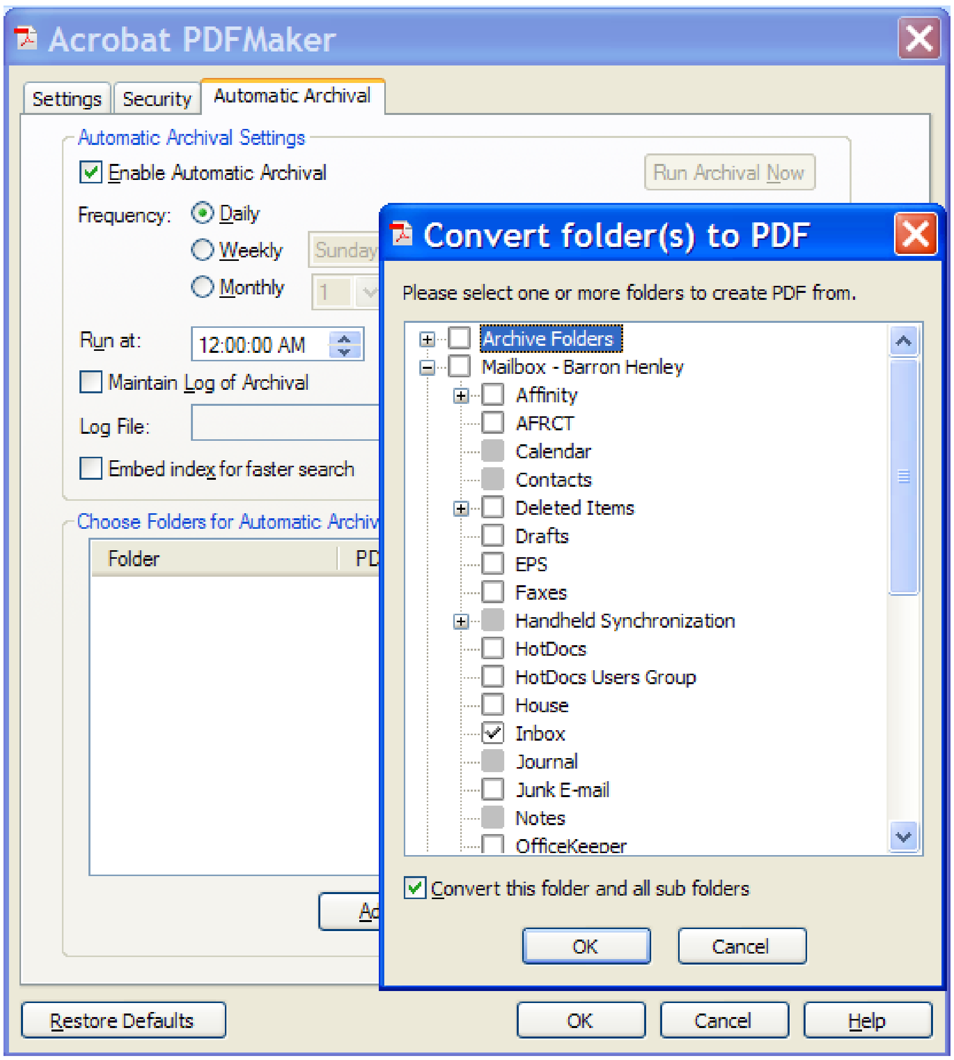
7. **Saving Email as PDF Files**: If you have a compatible version of Adobe Acrobat, it installs a few buttons and one additional menu in Microsoft Outlook. For those that wish they had a good way to archive and store emails and attachments, this integration can be a life-saver.



a. **Acrobat - Creating PDFs from Individual Emails or Entire Folders**: Simply select individual emails (Ctrl + left click) or select entire folders; then click the Adobe PDF menu/ribbon → Convert Selected Messages → Create New PDF. This will create a single PDF which contains all of the emails you've selected ***and all of the attachments thereto***.

b. **Acrobat - Adding Subsequent Emails to Existing PDFs**: If you receive additional emails which need to be added to an existing PDF archive, simply choose Convert Selected Messages ➔ Append to Existing Adobe PDF.

c. **Acrobat - Automatic Archival**: As you can see from the screen shot, you can also setup folders to automatically archive themselves. This would be particularly useful if you have setup Outlook rules to automatically sort your email into specific folders and then use Acrobat to automatically archive it.



d. **Saving PDFs Without Acrobat**: Other PDF programs that cost a lot less than Acrobat offer similar functionality to that described above with Outlook. For example, all of the following are fantastic:

i. **Nuance Power PDF Advanced**: Matches features of Acrobat Professional for only $149.99. See http://tinyurl.com/zwy2ym9. Windows only.

ii. **Nuance Power PDF Standard**: Matches features of Acrobat Standard for only $99.99. See http://tinyurl.com/nbtnasl. Windows only.

iii. **Foxit PhantomPDF for Business**: Very strong feature match with Acrobat Pro for $129. Also includes a 30 day free trial. For more information, see http://tinyurl.com/7ybcjwu. Windows only.

iv. **Foxit PhantomPDF Standard**: Strong match with Acrobat Standard for $89. Free trial - for more information, see http://tinyurl.com/p3znuj3. Windows only.

v. **Nitro Pro**: Matches the features of Acrobat Professional. They offer a Nitro Pro+ which is rental only for $7.99/month ($95.88 paid annually - no option to pay monthly) and Nitro Pro (desktop) which is $159.99. You can buy it here: https://www.gonitro.com/pro/for-you. Windows only.

F. Email Storage Tips:

1. **Store Email With Other Related Files**: Store the email in the same location as other electronic files related to any particular matter. Any system that requires you to save email separately from other electronic files related to a matter is inadequate.

2. **Delete or Archive Email Once Stored**: After an email is stored into a folder or a document management system, delete or archive it. Keep Outlook as clean as possible.

3. **Always Separately Save Attached Documents**: Outlook is NOT a document management system and should not be used as a document repository. Documents attached to Outlook emails are actually stored in a temporary folder structure that is incredibly convoluted and is normally hidden. For example, the attachment to an email I just opened is stored in my hard drive under this folder:

   C:\Users\barron\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Outlook\O0T0A5E5

   For the record, that's 8 folders deep and the structure from \Temporary Internet Files down is not even visible in Windows Explorer. The point is, it is incredibly easy to lose attached documents that aren't saved separately (unless you have a document management system that saves attachments at the same time the email itself is saved).

4. **Stop Printing Email**: If you've saved email digitally, then they're easily searchable and printing them to throw in paper files only makes your paper files fatter, harder to manage and harder to search.

G. **Benefits of Storing Email Outside of Outlook**:

1. **No Worry About Email Storage Limitations**: If you offload the email in your Outlook folder structure and save them as separate files or in other programs, then you can get them out of Outlook. As such, the IT folks will stop complaining that you're overloading the Exchange server and your computer will operate faster.

2. **Everyone Else Can Find Them Too**: Once saved as separate files, others in your office will be able to find these important client communications. You're on your way to building a complete digital file.

3. **Searchable Like All Other Documents**: If you're saving into a document management system, then the content of all email stored therein is searchable. If the email is stored as separate files (PDFs, MSG files), then there are free or very inexpensive search programs that can help you find any of them by the words contained inside them.

IV. DEALING WITH THE OVERLOAD - YOUR EMAIL GAME PLAN

A. **Deal with Email at Set Times**: The first problem that we want to deal with is the reduction of interruptions so one can be more focused and productive. After all, how on earth can anyone get anything done with an interruption every 2-3 minutes?

Ask yourself the following question: 10 years ago, would you have let someone walk in your office every 2-3 minutes offering to sell you a sexual enhancement product… or asking you for a favor?

Of course you wouldn't! So, why do you let it happen now with your email? Why do you drop everything that you are doing to read and/or respond to that email that just arrived?! You have invested thousands of dollars in this wonderful technology that is supposed to make you more efficient, but instead it has created an interruption hotline going straight to your brain.

Some time management experts suggest checking email 2 times a day. While this may sound like a good plan, it is probably unrealistic. When email was just becoming popular, there wasn't an expectation of that email would be dealt with immediately, so 2 times per day was probably okay. However, in today's age that has changed to some degree. Entire companies communicate via email … it's a way of life and the way everyone communicates. Checking email twice a day isn't enough. I think 3-5 times a day is more realistic … more satisfying to senders … and just as important, will make it easier for you to prevent your inbox from growing out of control.

A good way to handle this is deal with email at the same time every day. For example, you could following this schedule **and limit yourself to 10-15 minutes**.

1 – Upon arrival at the office: 8:00 am

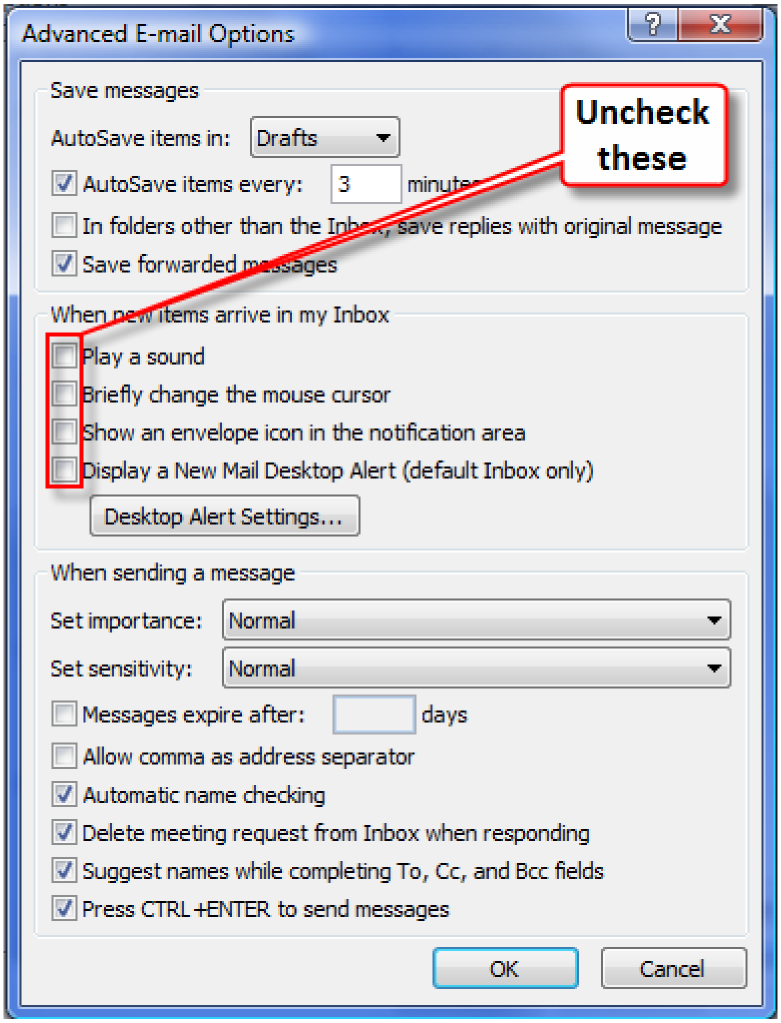
2 – Mid morning: 10:30 am

3 – After lunch: 12:30 pm

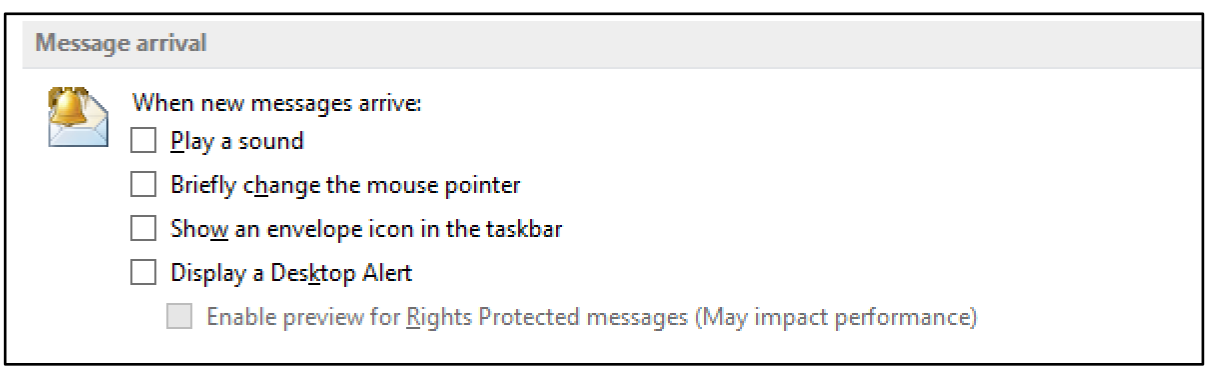
4 – Afternoon: 3:30 pm

5 – End of day: 5:00 pm

B. **Turn Off Outlook's Notifications About Email**: You see that little envelope in the bottom, right corner of your screen and you can almost hear it saying, "read me!" The constant notifications of new email are one of the primary distractions for most people. So turn them off! It's amazing how more focused you can be when your computer isn't announcing incoming email every few minutes (or seconds). To do this in Outlook 2007, click the Tools menu → Options → Preferences tab → E-mail Options button → Advanced E-mail Options button and uncheck the boxes you find there.



In Outlook 2010/13/16, click the File menu 🡆 Options (left side) 🡆 Mail (left side) 🡆 clear all of the boxes under Message Arrival.



C. **Treat Email Inbox like you U.S. Mail Box – Keep it Empty!** Would you ever keep your U.S. Mailbox in this condition? Of course you wouldn't. So don't let your inbox get that way! However, for most people, maintaining email is the weakest link in their system of organization primarily because of volume and frequency. They use it as a holding bucket for undecided and unresolved tasks.

The key to mastering your inbox is to keep it empty – or under 20. You certainly don't need to keep it at zero. In fact, if you tried, you would probably be wasting time, not saving time. Not to mention, you will also be developing bad obsessive/compulsive habits. Every time an email landed in your inbox, you would drop everything and try to deal with it. That would be horribly inefficient.

The truth is that in order to process email efficiently, you <u>must</u> be able to see your emails in a single screen (or close to it). It is very difficult and overwhelming to process emails and tasks when you are staring at a screen with 500 emails.

So what do you do with your U.S. Mailbox? One of the best time management/organization tips that I learned and implemented nearly ten years ago is this: Throw away your (U.S.) junk mail and advertisements before you get into the house. Only bring mail into your house that you intend to do something with!

D. **Delete Whatever You Can Immediately!** Learn how to use the DELETE key. That could be the first thing that you do before you start dealing with email … just like <u>not</u> bringing junk mail and annoying advertising into your home. Delete the following:

- All the email that gets past your SPAM filter.
- Interoffice SPAM that is irrelevant to you.
- Jokes from annoying friends and c-workers.
- Email from people you don't like (unless it's important, of course)

TIP: Sort email based on the **From** field (by hitting the **From** column header). You can often get rid of tons of email sent from the same person. Remember that you can select a chunk of email by single left clicking on the first email – holding the Shift-key down and single left click on the last email.

E. **If You Can Deal With It In Under 3 Minutes, Do It Now**: The 3-minute rule is gold! Any email that can be responded to or dealt with (saved in a client file, forwarded, deleted, etc.) within 3 minutes should be dealt with immediately – the first time you lay eyes on it. This rule is based on the premise that the 2nd time you have to deal with the email, it will take you longer than 3 minutes 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 if you have the 3 minutes to deal with it!

TIP: Don't forget that you <u>may</u> be able to deal with it more quickly by picking up the phone or walking around the corner.

Remember, you are still supposed to be handling these emails only at scheduled/set times during the day! This will be a difficult temptation to overcome – especially if you have email notification turned on and see an email that you can dispose of quickly.

Finally, if it is an email that is going to take a while, you should dispose of it in under 3 minutes by adding it to your task list (or calendar) <u>and</u> then saving it into the appropriate client/matter file.

F. Delegate If Appropriate: If someone else should be handling the task or issue in the email, then 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. Do this immediately unless it is going to take you more than 3 minutes to delegate. You can make this easy to track by setting up the Delegated Email rule described in paragraph III.B.4 above (page 6).

G. Delay If Necessary: Already mentioned in the 3-minute rule above, if it is an email that is going to take a while, you should simply dispose of it in under 3 minutes by adding it to your task list (or calendar) <u>and</u> then saving it into the appropriate client/matter file.

- Do <u>not</u> use Outlook as your to-do list by leaving unresolved email in your inbox.
- If you keep a paper-based task list, simply write it in and save the email in appropriate place.
- If you use Outlook to manage your task list, simply drag it over to your **Task** button in the Outlook navigator.
- In some circumstances, it is okay to set up subfolders under your inbox. Clean them out on a weekly basis.
- If you schedule your tasks as appointments, add it to your calendar.

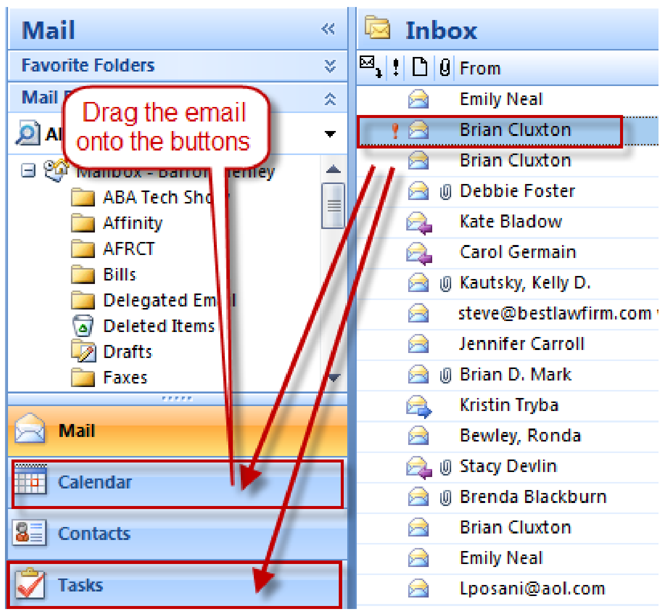
H. Outlook Techniques Which Will Help:

1. See More Email In One Screen:

a. Turn Off Viewing Pane: This occupies a lot of screen space that could otherwise be displaying email. To turn it off in Outlook 2007, click the View menu ➔ Reading Pane ➔ Off. In Outlook 2010/13/16, click the View ribbon ➔ Reading Pane button ➔ Off.

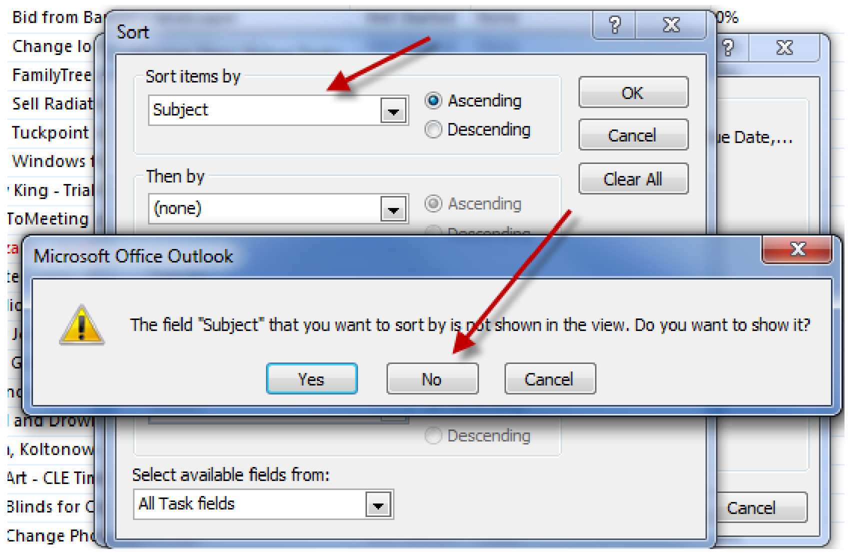
b. **Turn Off Date Grouping**: By default, Outlook groups your email by date received. The date categories just occupy space and prevent you from seeing all of your email on one screen. To turn it off in Outlook 2007, click the View menu ➔ Arrange By ➔ uncheck Show in Groups. In Outlook 2010/13/16, click the View ribbon ➔ View Settings button ➔ Group By button ➔ uncheck Automatically group according to arrangement.

2. **Quickly Convert Email to Appointments or Tasks**: You can simply drag email onto your calendar or tasks button in Outlook and it will make an appointment or task out of it (but it leaves your original email where it was).

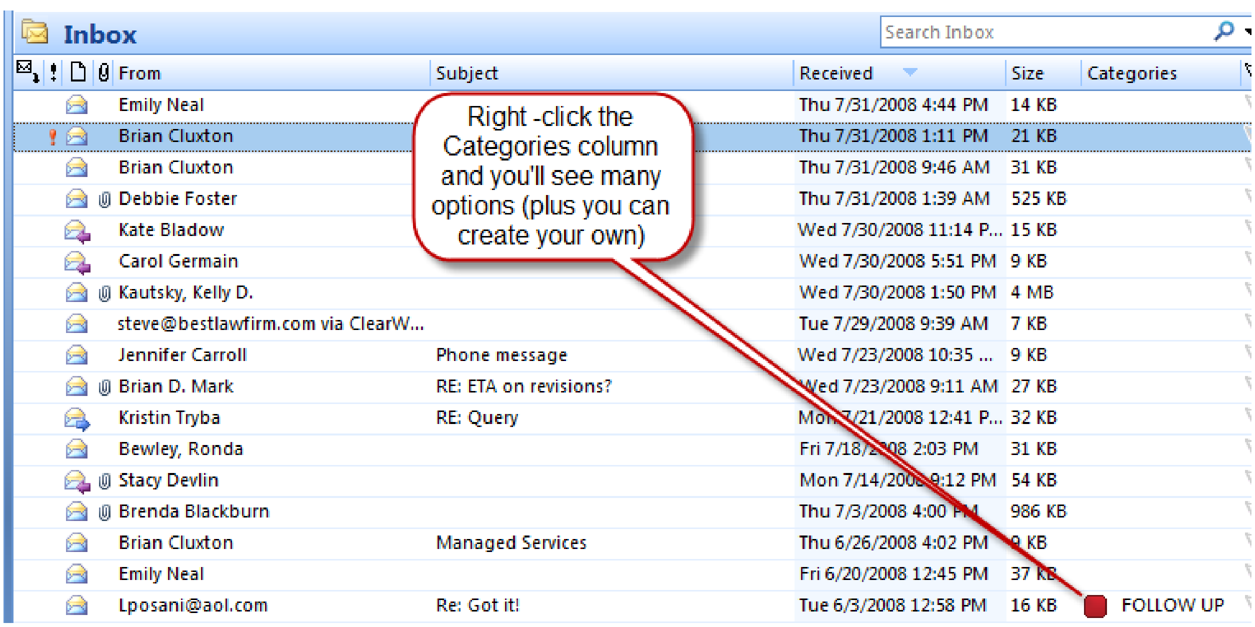


3. **Tasks in Outlook**: Name your tasks based on Project first, and then a hyphen followed by a description of the work. Then modify your task list to show only active tasks (not completed). To do this, select Active Tasks and then Customize Current View.

Next, select **Sort items by** … **Subject** and then answer **No** to showing the field.



4. **Use Outlook 2007/10 Categories**: This is a new feature in Outlook 2007 and is extremely useful for flagging email.

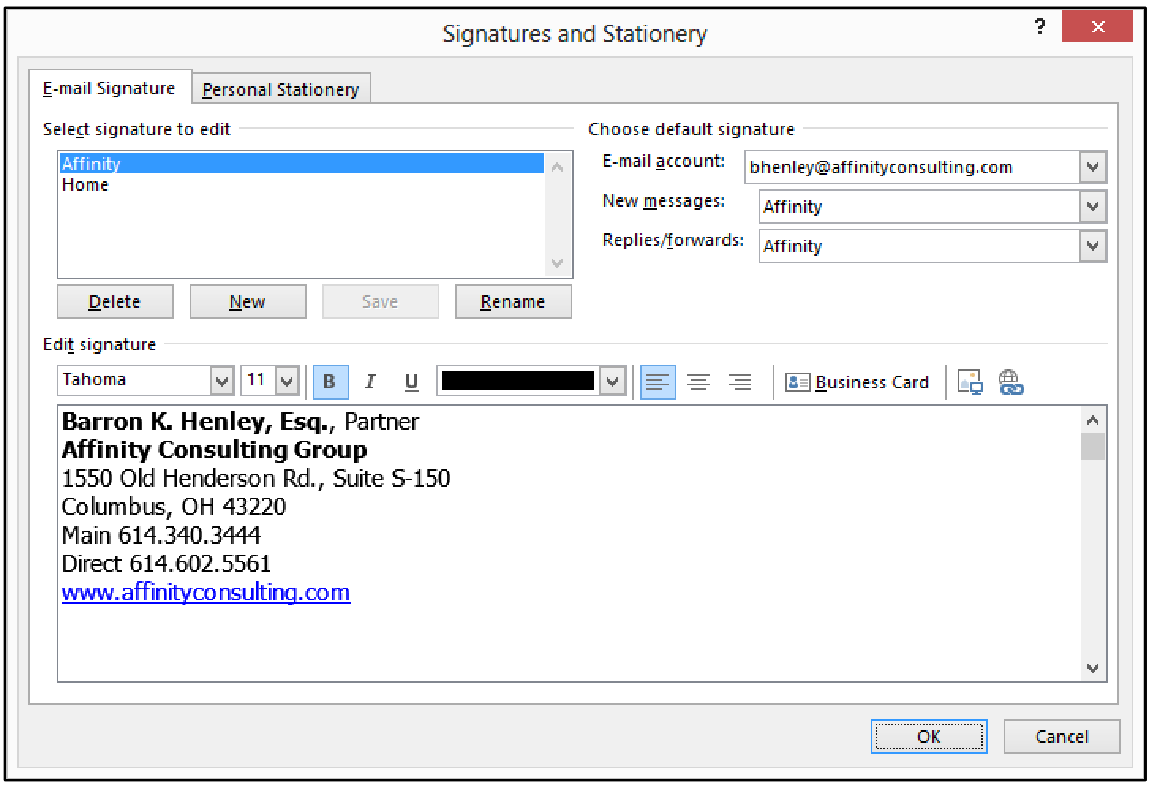


V. RECOMMENDED OUTLOOK DEFAULT SETTING CHANGES:

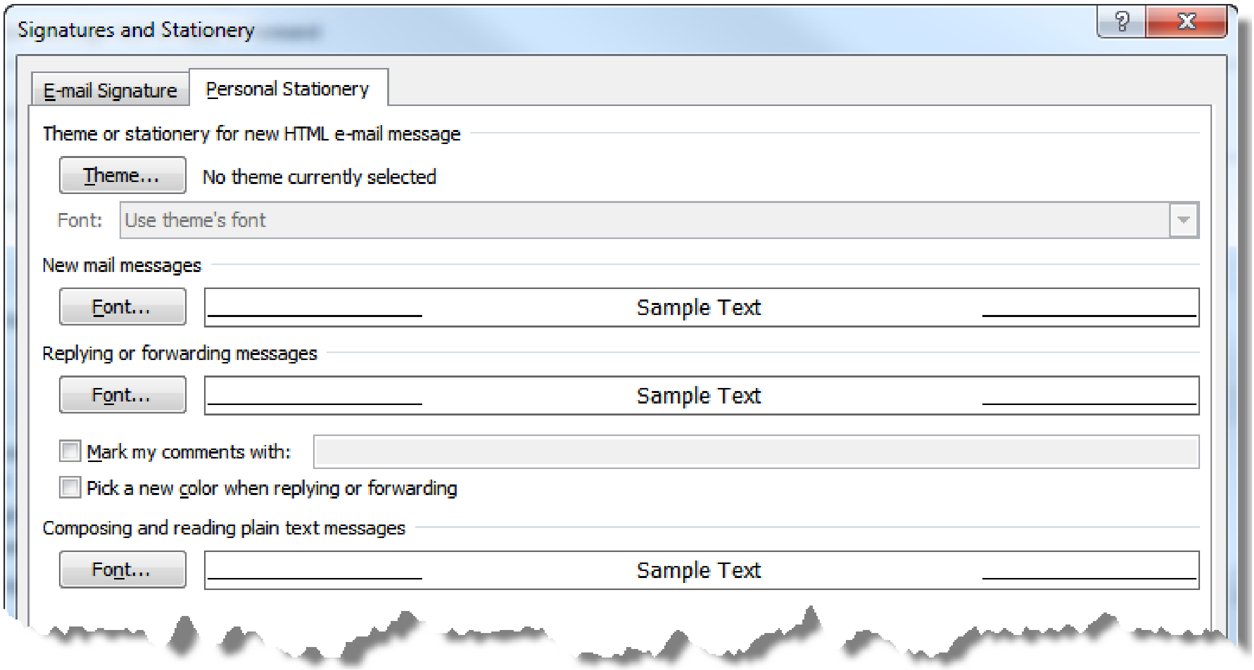
A. Changes to Mail Settings: Note that you get to all of these by clicking the File menu ➔ Options ➔ Mail.

1. **Check Spelling Automatically**: Under Compose Messages, check Always check spelling…

2. **Set up your Signature Block:** In Outlook 2007, click the Tools menu → Options → Mail Format tab → Signatures button. In Outlook 2010/13/16, click the File menu → Options button → Mail tab (left side) → Signatures button. It is recommended that you have some kind of signature automatically attached to every new message and every reply/forward. However, the reply/forward signature doesn't and arguably shouldn't be as detailed as the one you use for new messages.

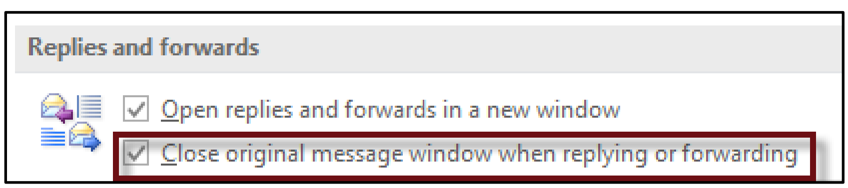


3. **Fix Outlook's Fonts**: In Outlook 2007, click the Tools menu → Options → Mail Format tab → Stationery and Fonts. In Outlook 2010/13/16, click the File menu → Options button → Mail tab (left side) → Stationery and Fonts button. Now make them all the same (they're not the same by default):



4. **Turn Off Message Notifications**: As described in paragraph IV.B. above, you can turn off email notifications and we strongly recommend that you at least try this.

5. **Close Original Messages When Replying or Forwarding**: Under Replies and forwards, check the box shown below:



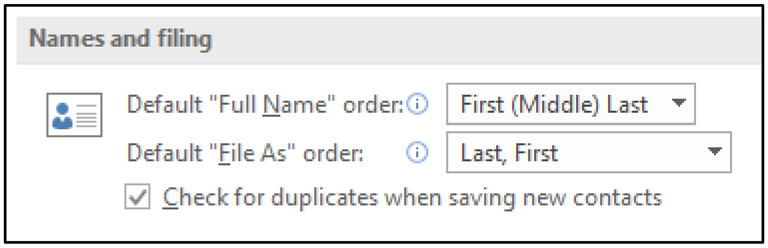
B. **Changes to Calendar Settings**: Note that you get to all of these by clicking the File menu → Options → Calendar.

1. **Change Work Start and End Hours**: If you work different hours than Outlook's defaults, you can change them under Work time.

2. **Default Reminder Timing**: Many people want more than 15 minute reminders for appointments. Below Calendar Options is where you can change that.

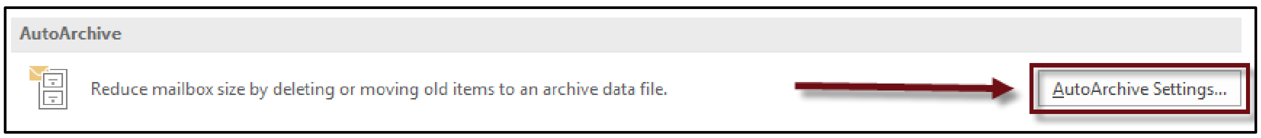
3. **Change Calendar Color**: Under Display Options, you can change the calendar color to another pastel.

C. **Changes to People Settings**: Note that you get to this setting by clicking the File menu 🡪 Options 🡪 People. You'll probably want to make sure your settings are the same as shown below:



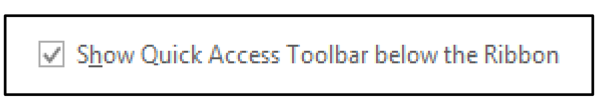
D. **Changes to Advanced Settings**: Note that you get to these settings by clicking the File menu 🡪 Options 🡪 Advanced.

1. **AutoArchive Settings**: There are many ways to get to these settings, but click the AutoArchive Settings button will allow you to turn on or off these settings and customize them as well.



2. **Change Your Reminder Sound**: If you would prefer another sound as a reminder, you can make the change under Reminders.

E. **Changes to the Quick Access Toolbar**: Note that you get to this setting by clicking the File menu 🡪 Options 🡪 Quick Access Toolbar. Here is where you can add buttons which are always visible regardless of what part of Outlook you're in. I also recommend checking the box at the bottom of the screen that says Show Quick Access Toolbar below the Ribbon.

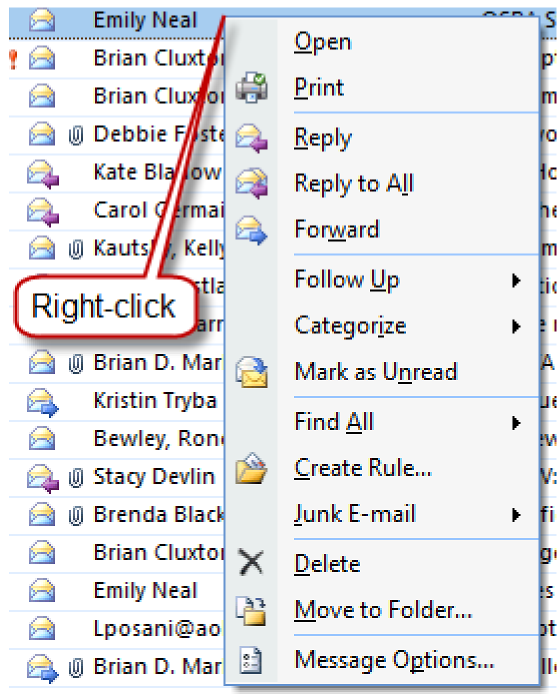


VI. OTHER OUTLOOK TIPS AND TRICKS:

A. **Outlook 2013/16 Quick Reference Sheet**: See Exhibit A on page 38 below.

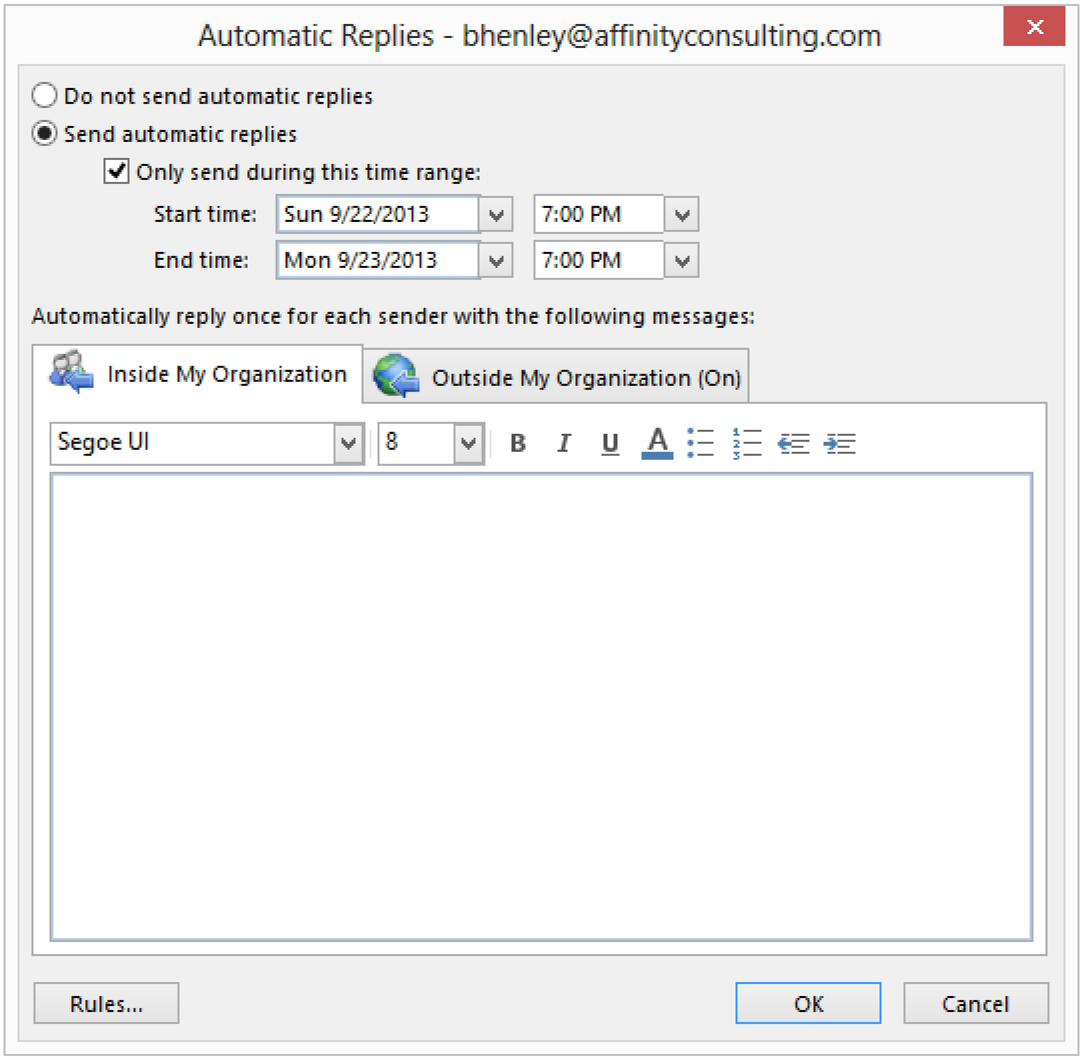
B. **Create Contacts from Email**: Drag and drop an email to the Contacts button and Outlook will create a new contact card for that email sender.

C. **Right-Click Email for All Possible Options**: Also known as alternate clicking, this feature will present very handy functions such as Open, Reply, Print, Forward, etc.



D. **Rules Creating Flags and Alerts**: You can manage multiple email accounts or large numbers of emails from an important client by setting up a Rule that tags the email with a colored flag/alert or plays a special sound upon arrival. This will enable you to quickly view and group emails from a particular source.

E. **Out of Office Assistant/Automatic Replies**: If you're going to be out of the office, this is a way to automatically notify people who send you email. However, if you're receiving email from a listserv, this may be a problem because every time someone sends a post to the listserv, everyone on the listserv is going to get your out of office message. In any event, to turn on this feature in Outlook 2007, click the Tools menu → Out of Office Assistant → Send Out of Office auto-replies and set it up. If you're using Outlook 2010/13/16, the feature has been re-named Automatic Replies. Get to it by clicking the File menu → Info (left side) → Automatic Replies button.



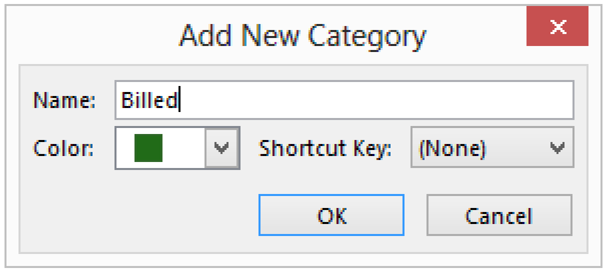
F. **Learn To Use Categories**: This feature allows you to color code or tag an appointment, email, contact, or task with a named category which has a color assigned to it. I find these to be particularly useful with appointments and email. Assigning a category to an appointment turns the entire appointment the color of the category. You can also sort by category which can be useful with email.

Let's say you want to create a category called Billed which you will assign to each appointment on your calendar AFTER it is billed. Just follow these steps:

1. Right-click an appointment you have billed.

2. Choose Categorize → All Categories

3. Click the NEW button and create a category as follows:



4. Click OK ➔ OK.

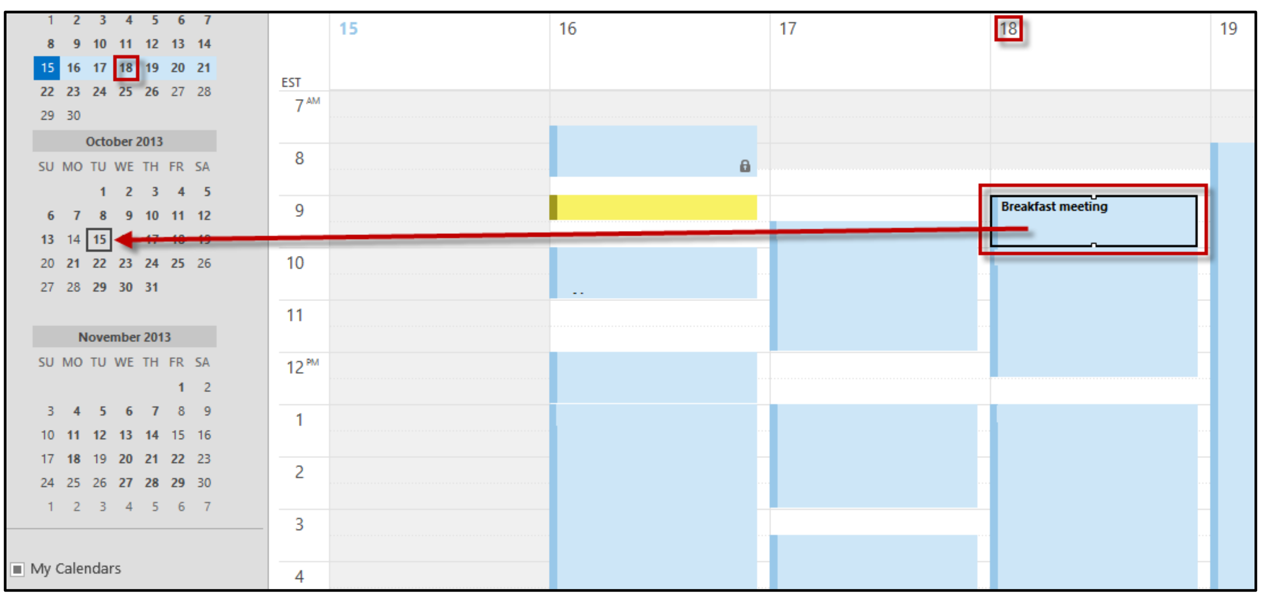
G. **View Non-Contiguous Days on Your Calendar Side By Side**: A business associate wants to schedule a lunch on a Thursday in October. You want to see your Thursdays side-by-side. Here's what you do:

   1. Go to your Outlook calendar and click on the DAY button.

   2. Left-click on the first Thursday in October.

   3. Now hold down on the Ctrl key and left click the rest of the Thursdays in October. You'll see all of them side-by-side and can easily determine which would work best for you.

H. **Move An Appointment By Dragging It**: If an appointment gets moved, the easiest way to make the change on your calendar is by dragging it to the new day. When you're in the calendar in Outlook, the "Folder Pane" on the left side of the screen can be re-sized to show you multiple months. An appointment from the right side of your screen can be dragged to any day you see on the left.



If you want to COPY the appointment rather than move it, follow the steps above, but hold down on the Ctrl key at the same time.

I. **Saving Attachments to Email**:

1. **One At A Time**: Open the email, right click the attachment and choose Save As.

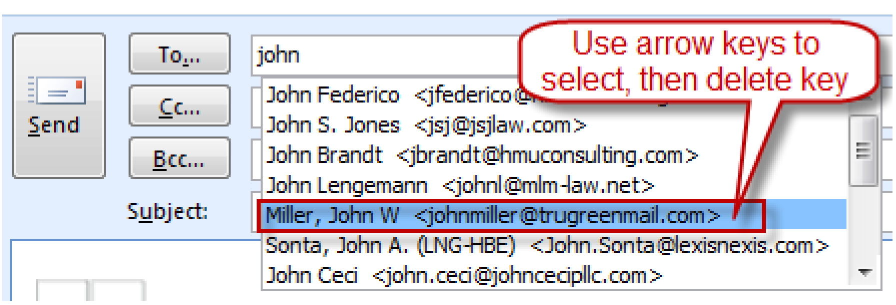
2. **In Bulk**:

- Outlook 2010/13/16 - File menu ➔ Save Attachments
- Outlook 2007 – Office button ➔ Save As ➔ Save Attachments
- Outlook 2003 – File menu ➔ Save Attachments ➔ All Attachments

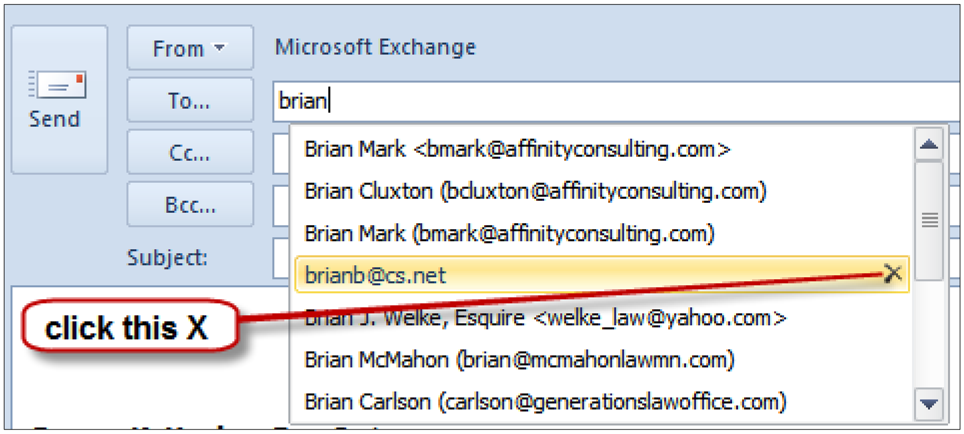
J. **Distribution Lists (Outlook 2007)/Contact Groups (Outlook 2010/13/16)**: If you routinely send email to a group of people, you can create a distribution list or contact group which will make it much easier. For example, I have a Contact Group called Affinity which automatically sends the email to 5 other people. All I have to type in the TO box is Affinity. To create one in Outlook 2007, just click the File menu ➔ New ➔ Distribution List ➔ name the distribution list and add the email addresses of the people you want to include. In Outlook 2010/13/16, go to your Contacts in Outlook ➔ New Contact Group button (Home ribbon) ➔ name the group and add the appropriate email addresses.

K. **Find Contacts Super-Fast**: For the Quick Contact Search, just hit the F11 key and type in a first or last name.

L. **Edit The Auto-Complete List**: If you send an email to a person one time, then Outlook will remember their email address the next time you start typing anything that begins with the first letters of that person's email address. This has resulted in lots of email being sent to the wrong person. Outlook auto-completes an email address and it's the wrong one. In Outlook 2007, if you want to get rid of that person from auto complete you only sent one email to, start typing a name in the TO box of a new email. When the list appears, use your **arrow keys** to highlight the one you want to delete, then hit your delete key.

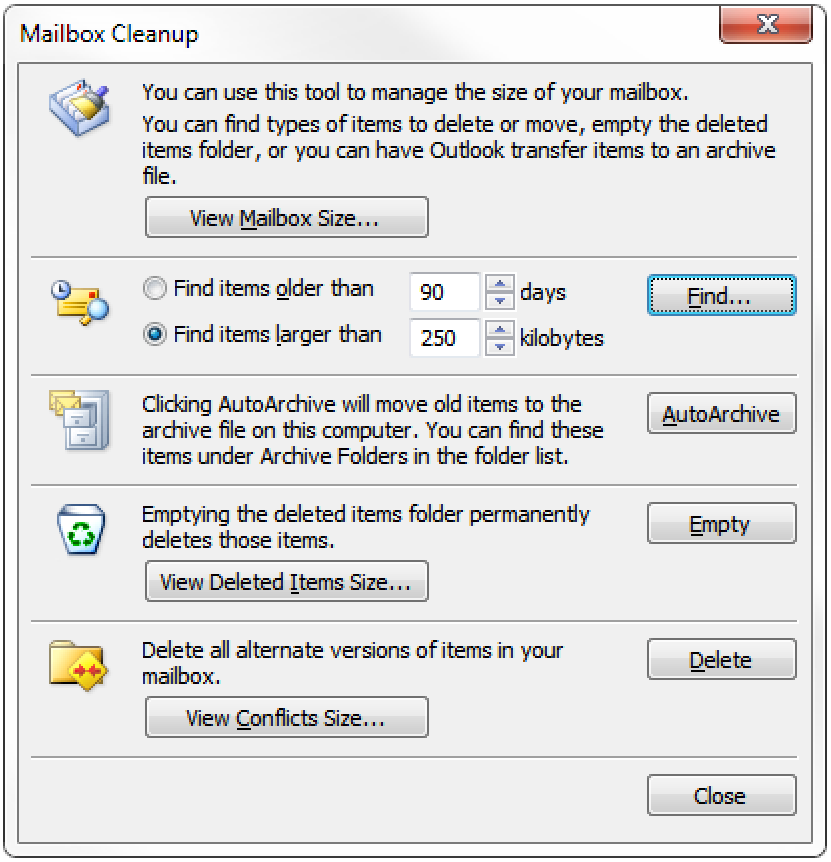


They've made this process easier in Outlook 2010/13/16. Just start typing a name and when the auto-complete list of names appears, you can hover over the one you want to remove with your mouse and click the X that appears on the right side of each name:



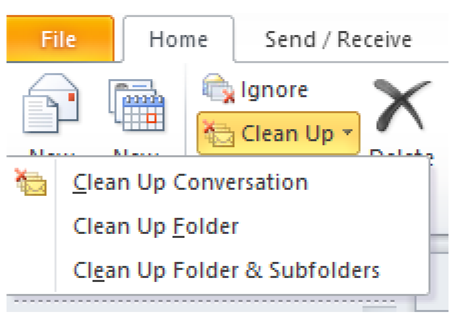
M. **Use Rules and Alerts**: To help you keep your Inbox to a manageable size, use the **Rules** feature to automatically forward, move to another folder, or delete incoming messages, especially those from email lists. In Outlook 2007, Tools menu → Rules Wizard → create a new Rule. In Outlook 2010/13/16, File menu → Manage Rules and Alerts button. For more information on this, see paragraph III.B.2. on page 4 above. This is especially helpful if you do not have a good SPAM filter. Rules are also great for managing email from Listserves.

N. **Mailbox Cleanup**: This is an extremely useful tool. In Outlook 2007, you access it by clicking Tools menu → Mailbox Cleanup. In Outlook 2010/13/16, you access it by clicking File menu → Info tab (left side) → Cleanup Tools button. See below for all of the options it provides:



O. **Remove Redundant Messages in Outlook 2010/13/16**: This is a feature only present in Outlook 2010/13/16. An email conversation is also known as a thread. Many people have multiple emails in their Outlook folders which are earlier pieces of the same thread. The last email in time contains the entirety of the conversation so the older ones aren't needed. Outlook now has a great feature for cleaning up such messes. Just follow these steps:

1. On the home ribbon, click the Clean Up button in the Delete group.



2. Click one of the following:

a. Clean Up Conversation: The current Conversation is reviewed, and redundant messages are deleted.

b. **Clean Up Folder**: All Conversations in the selected folder are reviewed, and redundant messages are deleted.

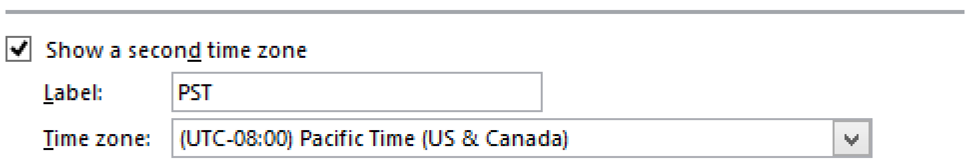
c. **Clean Up Folder & Subfolders**: All Conversations in the selected folder and any folder that it contains are reviewed, and redundant messages are deleted.

P. Open Multiple Time Zones in Your Outlook Calendar: I'm often trying to schedule phone conferences with people in time zones other than the one I live in (eastern). Outlook has a great way to make this easier on you by opening another time zone adjacent to yours. Just follow these steps:

1. Open your calendar in Outlook.

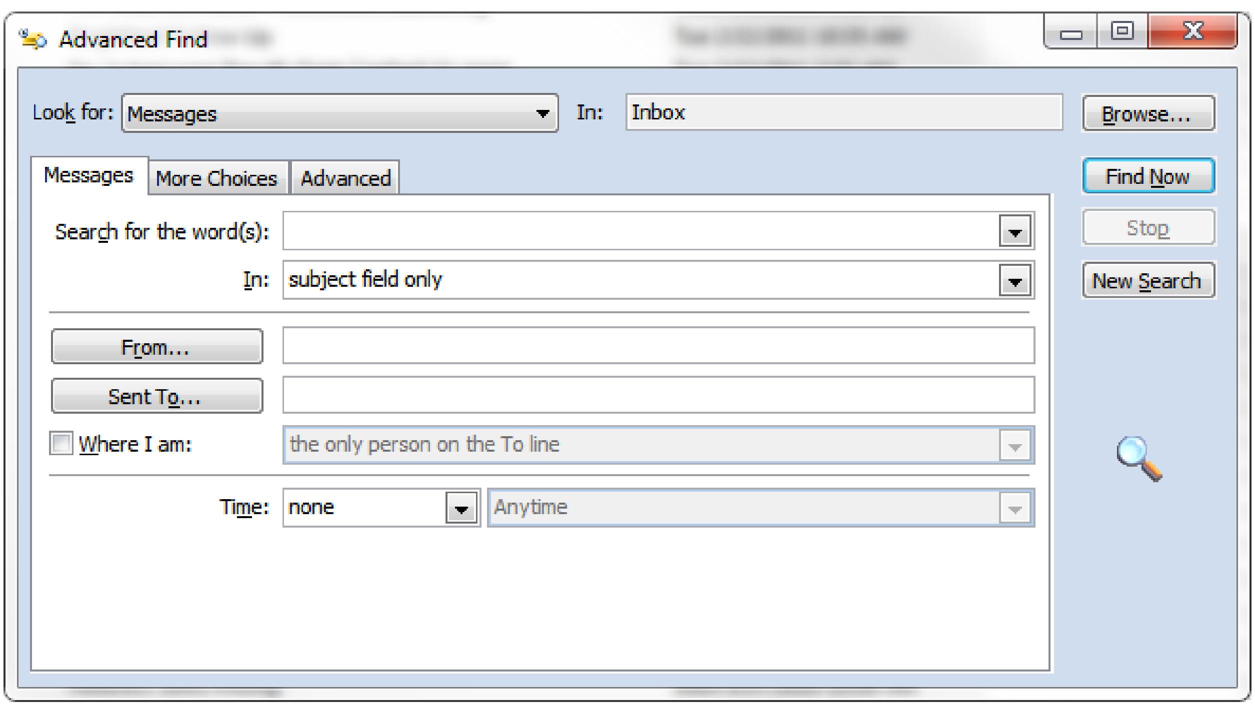
2. Right-click the vertical time bar on the left side of the calendar and choose **Change Time Zone**.

3. Check the **Show a second time zone** box and choose the time zone you want to show, add a label, and click OK.

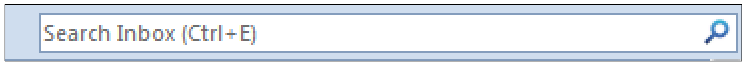


4. Now you'll have two zones side-by-side!

Q. **Advanced Search Capability**: This feature gives you a tremendous number of options for searching through Outlook. Simply hit **Ctrl + Shift + F**.

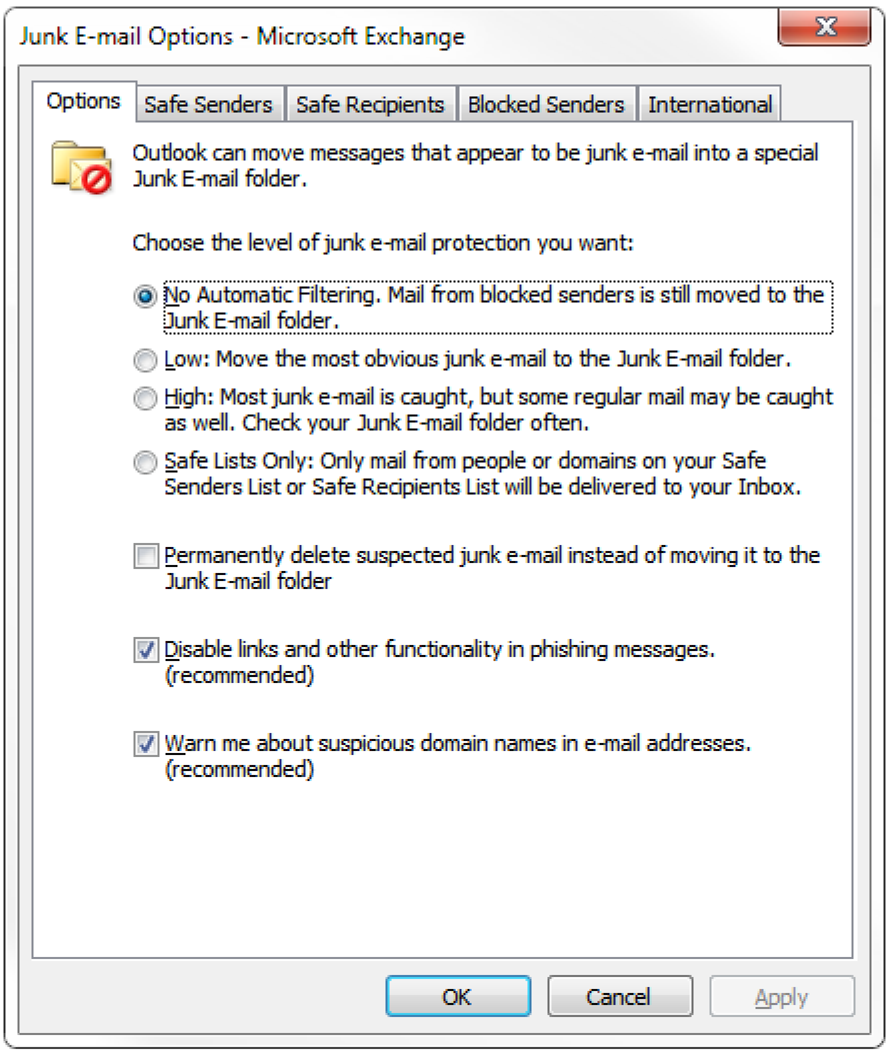


R. **Email Quick Search in Outlook 2010/13/16**: At the top of each mail folder, you'll see a box like the one below:



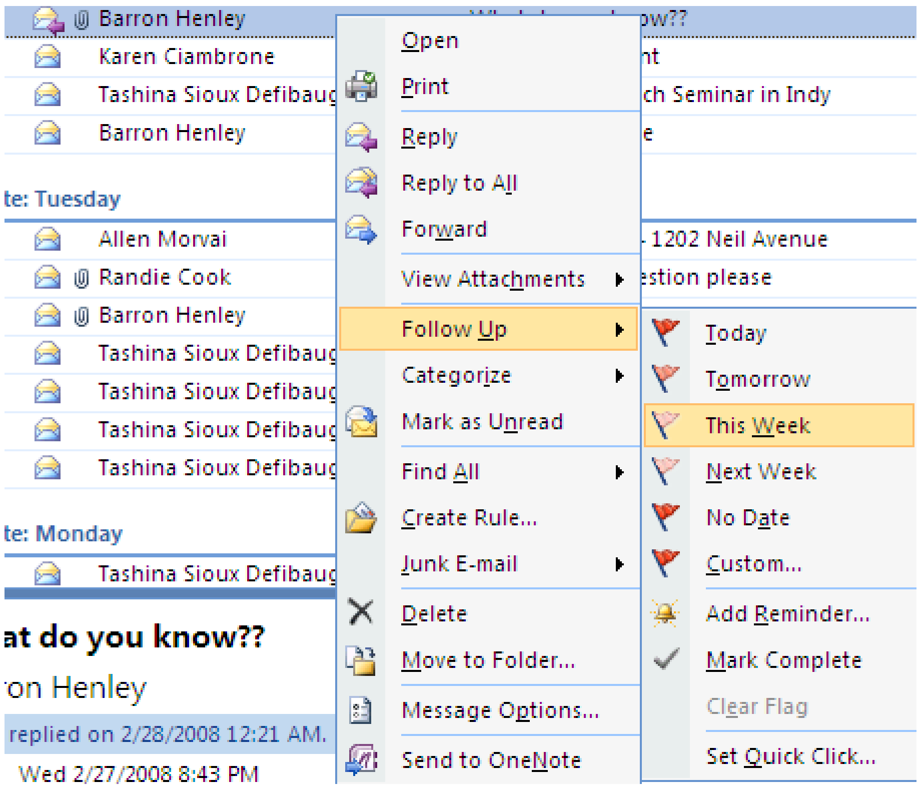
This will search for words you type in the email address or body of any email contained in that folder and it's *very* fast.

S. **Junk Mail Settings**: In Outlook 2007, click the Tools menu → Options → Preferences tab → Junk Email button to see all of the settings for this. You can get to the same dialog in Outlook 2010/13/16 by clicking on Mail → Junk button in the Delete group of the Home ribbon → Junk Email Options.

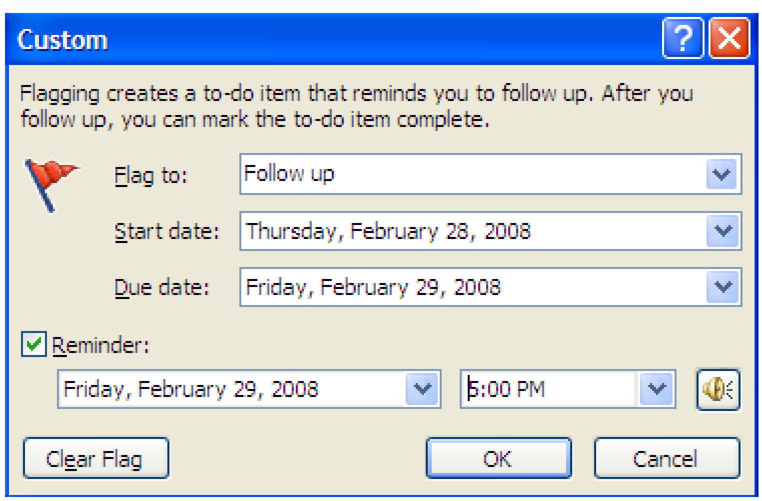


T. **Block Senders**: The easiest way to do this is to right-click an email from a sender you want to block in the future. In Outlook 2007, choose Junk Email → Add Sender to Blocked Senders List. In Outlook 2010/13/16, right-click the email, choose Junk → Block Sender.

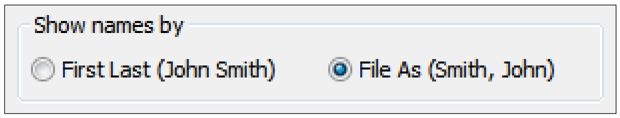
U. **Flags**: Flags are a great way to alert you to follow up on an important email, especially if your plan is to delay action with the email for a day or so. Simply right-click on the desired email and select **Follow Up** and then select the desired follow-up flag.



You can set a custom date as well. Outlook will notify alert you on the date and time specified.



V. **Make Outlook Show You Names Last Name First**: Outlook will annoyingly show you lists of contacts first name first. So if you want to send an email to someone and click the TO: button, you'll see the names are sorted by first name. To fix this, go into Control Panel in Windows ➔ Mail icon ➔ Email Accounts button ➔ Address Books tab ➔ single click on Outlook Address Book ➔ Change button (above) ➔ make the change shown below:



W. **Default Outlook To Your Contacts Address Book**: When you click the TO button in a new Outlook email, if you have Microsoft Exchange, it defaults to Global Address List which is your internal contact list. This forces you to switch to "Contacts" from the drop-down list every time in order to search your Outlook contacts for an email address. Here's how you change the default in Outlook 2010/13/16: Click Mail in Outlook ➔ on the Home ribbon, click the Address Book button ➔ Tools menu ➔ Options ➔ under "When opening the address book..." choose Contacts.

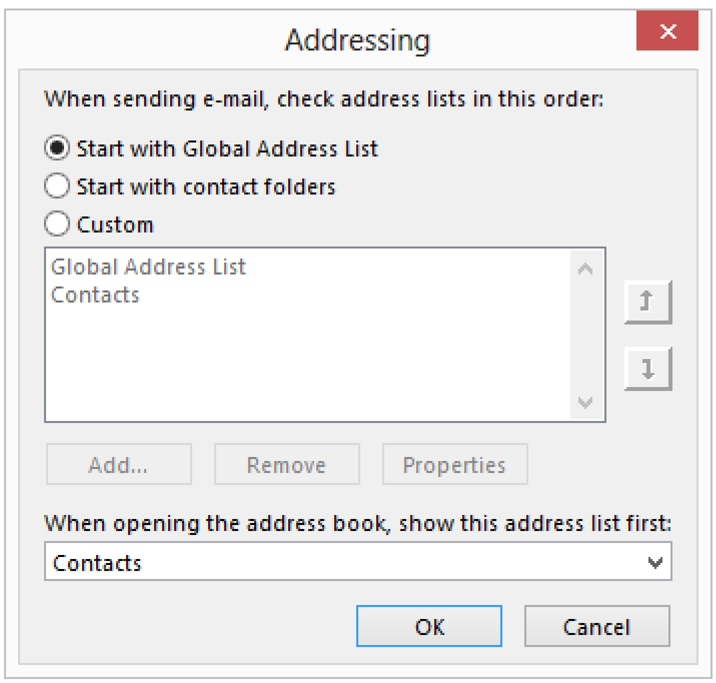


EXHIBIT A
OUTLOOK 2013/16 QUICK REFERENCE GUIDE

Backstage and Options

Click the FILE tab to see the "backstage" view in Outlook. Backstage commands include the following:

Info: *Account Options*

Out of Office Message or Automatic Replies (Click "Send Automatic Replies" in the dialog and type in a message for people in your office and out of your office. These can contain the same message.)

Open & Export: *Open Calendar* (opens a calendar file, **not** someone else's calendar)

Open Outlook Data File (use to open PST files)

Import/Export (import or export data)

Other User's Folder (use to open someone else's email or calendar)

Save As: Save an Outlook item to the hard drive or network.

Print: Print an Outlook item.

Office Account: Product information and/or Office 365 information.

Options: Opens the options dialog. Key options are the following:

General: Show Mini Toolbar (if checked, shows mini toolbar when selecting text)

Mail: Compose messages in this format (options are HTML, Plain Text and RTF. HTML recommended)

Mail: Always check spelling before sending (recommended)

Mail: Spelling and Autocorrect (make sure "Ignore words in Uppercase" is not checked)

Mail: Signatures (set up signatures for new and reply emails)

Mail: Stationary and Fonts (set up default fonts for new and reply emails)

Mail: Message arrival (set preference for notification of new email)

Mail:	Replies and forwards (set preference to quote prior email message)
Calendar:	Work Time (set work week and start and end times for work day)
Calendar:	Calendar Options (set default reminders)
Calendar:	Display options (set default color and misc. options)
Calendar:	Time Zones (***important*: set time zone**, can add second time zone to calendar)
People:	(Set name order and check for duplicates)
Tasks:	(Set reminders and colors).
Search:	(Search defaults)
Advanced:	(Start Outlook in particular folder; empty deleted items when exiting Outlook; show reminders; send email immediately when connected; prompt for confirmation before permanently deleting items.
Trust Center:	Trust Center Settings->Attachment Handling (sets preferences for previewing attachments in Outlook)

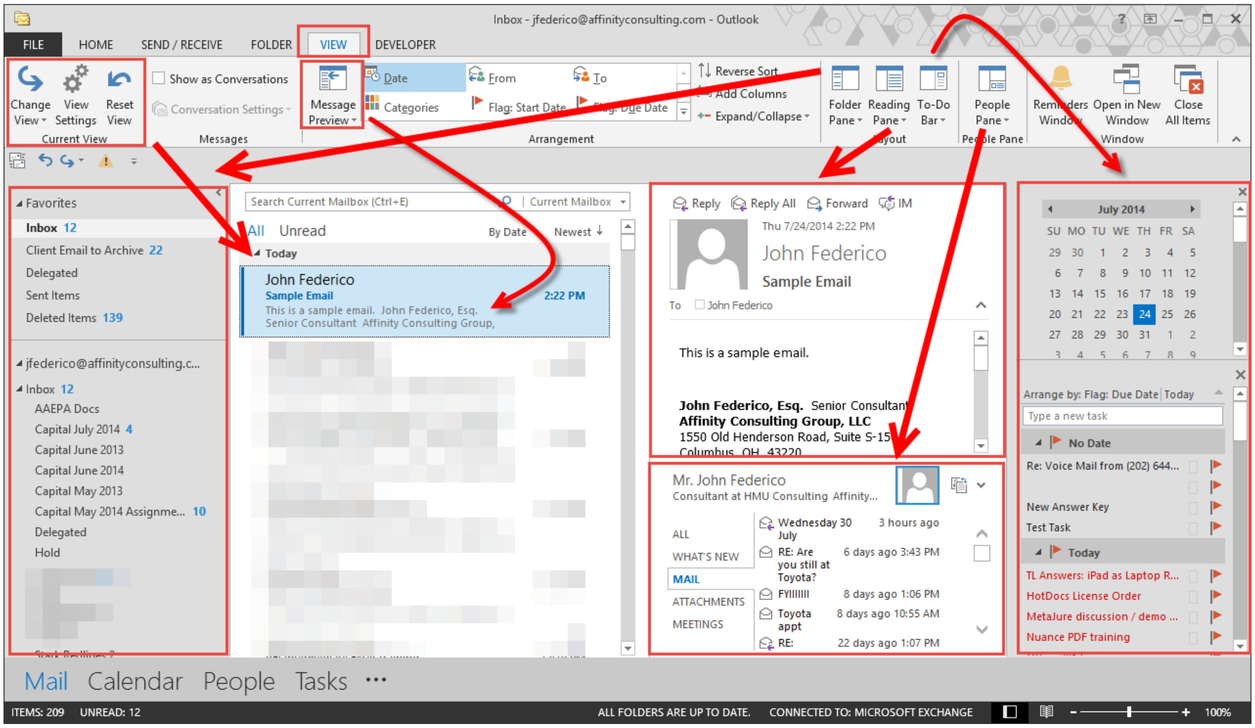
OUTLOOK IS ORGANIZED INTO FOLDERS

All items in Outlook are stored in Folders. Clicking on Mail, Calendar, People, or Tasks changes the view to that folder. To see all Outlook folders, click the three dots next to Tasks and choose "Folders".

MAIL

Configuring the Mail View:

Almost everything in the mail view can be turned on or off from the controls on the View tab. The diagram below show the controls for the various panels.



Reading emails: Double click on an email message or single click the message with the reading pane open.

Reading emails with attachments: Switch between viewing the email and the attachment using the “Message” and attachment buttons above the text of the email.

Reading Emails as Conversations: In the View tab for Mail, check the “Show as Conversations” box and select “This folder” in the dialog that appears. This groups email messages in a chain of emails and displays them as an expanding list. Use the “Clean Up” button on the Home tab to remove all emails with duplicate content.

Ignore Button (don’t use): **Warning** use this sparingly or not at all. Clicking this will automatically move all future emails in a conversation to the deleted items.

Filing Mailing Lists or Newsletters automatically with Rules: (1) Create a folder for the mail list or newsletter by right clicking on the mailbox folder and selecting “New Folder”. (2) Right click on the email and select Rules->Always move messages from and then choose the new folder as the location. This will automatically move those messages to the new folder. There is a limit of 50 rules in Outlook.

Junk Mail: To mark an email as junk, right click the email, select Junk and “Block Sender”. To change an email in the junk folder from junk to permitted, right click on the email, select Junk and then select “Not Junk”.

Saving Attachments: Right click on the attachment and select “Save as” or “Save all”. “Save all” will save all the attachments at once to a folder. Alternatively, drag and drop the attachments to the desired location.

Editing Attachments: Always save the attachment first before editing. Double clicking the attachment and opening it from Outlook creates a ***temporary*** copy of the file. If you edit the file and just click “save” (as opposed to “save as”), the changes will only be saved to the temporary file. You may or may not be able to recover those changes at a later date.

Search for Email Messages: Type search in the search bar at the top of the email list. The Search contextual tab will appear to give extra options. To add search criteria, use the “More” button in the Refine group of the Search tab. Change the scope as necessary to search in folders besides the current folder (change either in the drop down menu on the search bar or in the Scope group of the Search tab).

Search for Email Messages from the Same Person in the Current Message: Activate the people pane. This will display all messages from the individual in the current message. If the message is to more than one person, click on the appropriate person icon in the people pane.

Search Folders for Repetitive Searches: To reuse the same search over and over, create a search folder by going to the Folders tab and clicking “New Search Folder”. This will create a folder in the mailbox. When this folder is selected, the search will automatically re-run.

Flag a Message for Follow Up: To flag a message, click the flag icon in the mail list or click the flag button on the open message. This will appear on the task list, but is not a task. To make it an actual task, drag the email to the Task button.

Sending Email - autocomplete: To remove names and email addresses from the autocomplete feature, hover over the name and click the X.

Sending Email - adding attachments: To add an attachment, either click the attachment button or drag and drop the attachment into the email.

Sending Email - changing signature: To change the signature to something else, click the signature button on the Message ribbon.

Sending Email - boilerplate text: To reuse boilerplate text, select the text and save it as a quick part in the Insert ribbon. To reuse, click the quick parts button on the Insert ribbon.

Sending Email BCC: Activate the BCC line on the Options tab in a new email.

Quick Steps: Quick steps are used to automate repetitive steps. To create a quick step, click "Create New" in the Quick Step gallery. Choose the steps to repeat. This will create a button that will execute those steps. Examples for quick step use are to move the selected email to a folder, to send an email to a particular person or group, or to convert an email to a task or appointment.

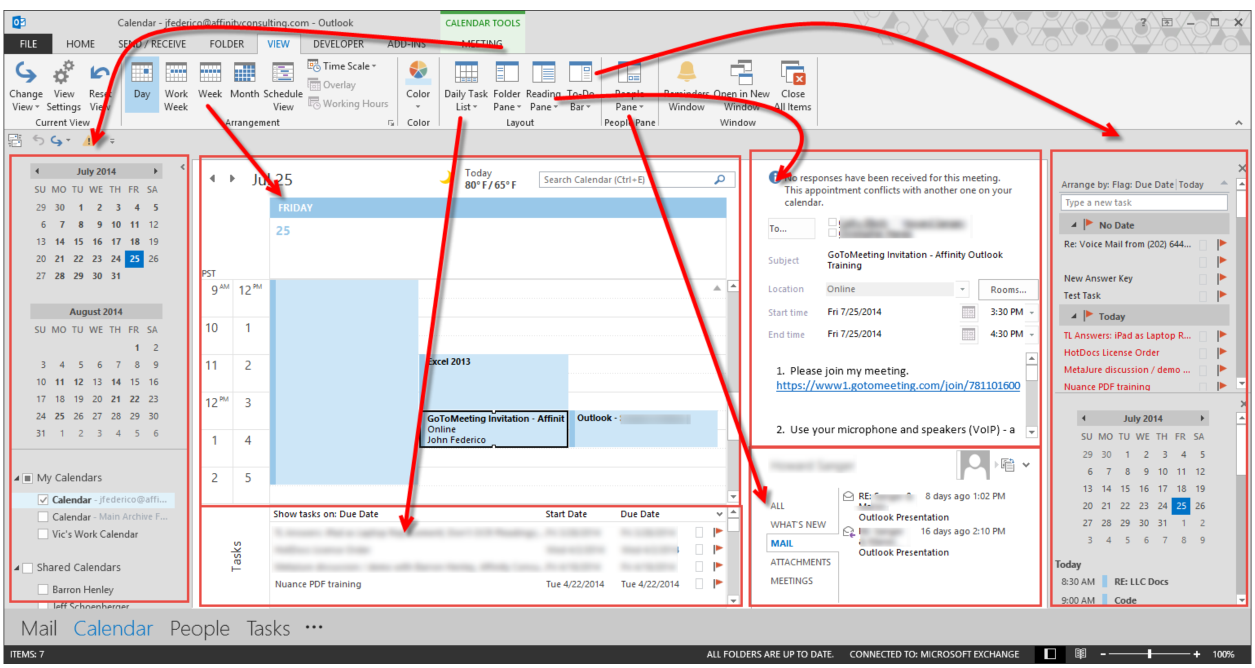
Convert Email to Task: Drag the email to the Task button.

Convert Email to Appointment: Drag email to Calendar icon, to time on the calendar or onto a date in To-Do bar.

CALENDAR

Configuring the Calendar View:

Almost everything in the calendar view can be turned on or off from the controls on the View tab. The diagram below shows the controls for the various panels.



To see tasks underneath the calendar, activate the “Daily Task List” on the View tab.

Create New Appointment: Click on calendar and start typing, click the “New Appointment” button on the Home tab, click “Actions->New Appointment” on the Home tab, drag and drop and email onto the calendar or press SHIFT+CTRL+A.

Duplicate an Appointment: Hold down the control key and drag the appointment to a different date.

Make Appointment Private: Right click on calendar and select “Private.” No one you share your calendar with will be able to see the details of the appointment. Outlook will continue to show the time of the appointment as busy.

Add a Second Time Zone: Right click on time bar, select “Change Time Zone”, and add a second time zone.

Display Non-Consecutive Days: Click on the first day, then CTRL+ click on the next days in the calendar on the left-hand side.

Send a Meeting Request: Either click the new meeting button on the Home tab or, in an appointment, click “Invite Attendees” to convert the appointment to a meeting.

Add Attachment to Appointment: Drag and drop the document into the Notes field.

Open a Shared Calendar: Click “Open Calendar” on the Home tab and then “Open Shared Calendar” or File->Open->Other User’s Folder.

Share Your Calendar: Click “Share Calendar” on the Home tab to send an invitation.

Give Elevated Permissions: Click “Calendar Permissions” on the Home tab, click the user, then set the permissions and click “OK”.

Create Calendar Group: Select Calendar Groups on the Home tab and Create new calendar group. Add calendars or rearrange calendars by dragging and dropping from another group.

View Email and Calendar in Separate Windows: Right click on Calendar button and select “Open in New Window”.

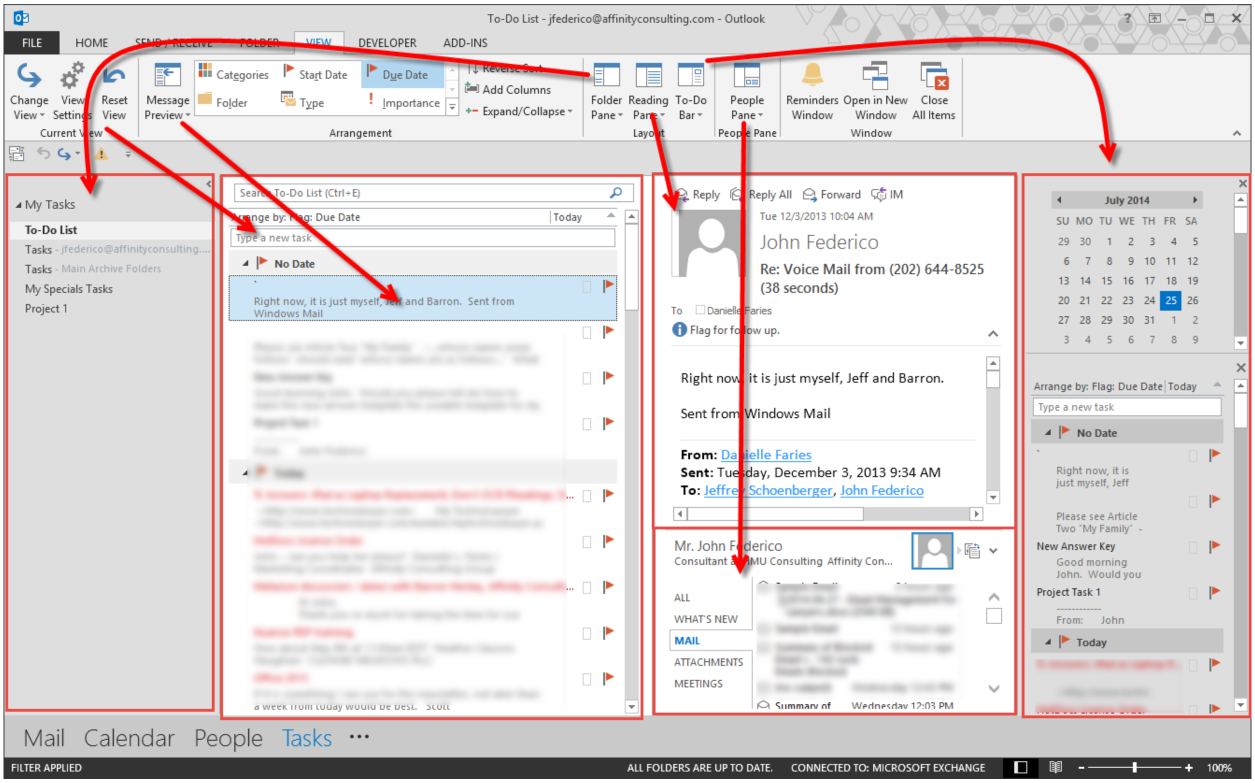
Printing Calendars: Use regular print, but Calendar Printing Assistant is available from Microsoft for custom printing.

Searching for Appointments: Type in the search box at the top of the calendar.

TASKS

Configuring the Tasks View:

Almost everything in the tasks view can be turned on or off from the controls on the View tab. The diagram below show the controls for the various panels.



Tasks vs To-Do List: A task is a separate item in a task folder. One or multiple task folders can be created (for example a task folder could be created for an individual project). The To-Do List aggregates all of the flagged items (emails) and all of the tasks from all of the folders into one list. Think of the To-Do List as a "master task list."

Creating Tasks: Click "New Task" on the Home tab, "New Items" then Task, or drag and drop email to Task button or screen.

Flagging an Email Does NOT Create a Task: Flagging an email will make the email appear in the To-Do list, but that is not the same as creating a task. A flagged email will disappear off the To-Do list if the email is deleted. However, a task created from an email (via drag and drop) creates a separate task item, independent of the email. An independent task item will stay on the task list even if the original email is deleted.

Setting Task Reminder: Check the Reminder box below the task end date, and set a reminder date and time.

Hide Completed Tasks: To hide completed tasks, click "View Settings" on the task View Tab, then Filter, then Advanced, and add "Complete equals No" to the list.

Assigning a Task: Open the task, click Assign Task, enter an email address, and click send. The Assignee now becomes the owner of the task and is the only one that can make changes to it. The Assignee can also send status reports back to the Assignor. There is a built in view under "Change View" to view assigned tasks in a folder.

Assign a Category to a Task: Click the Categorize button to add a category (or right click on the task). Go to Categorize->All Categories to add, delete, or rename categories. After assigning categories to tasks, create a view to sort the tasks by category. Examples of categories might be phone call, email, draft, etc.

PEOPLE

Create a new Contact: Click "New Contact" on the Home tab, "New Items," and then "Contact," drag and drop email on People button, right click on email address and select "add to contacts".

Quick Search for a Contact: Click F11 and then type the name of the contact. F11 will put the cursor in the contact search box.

New People View: Outlook 2013/16 defaults to the new People view by default. To change back to an older view, just click a different view in the "Current View" box on the Home tab of Contacts. The new people view has a streamlined interface and a streamlined editing dialog box for contacts. The people view also tries to aggregate contacts. So if the same person is in Outlook twice, the people pane will recognize the same name, link the contact cards, and present them as one card.