Time Management & Technology For Bar Leaders: *Practical Tips For Success & Sanity*

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Our Agenda

- Why Talk About Time Management & Technology
- Managing Phones
- Managing Email
- Other Technology That Can Help You
- Managing Meetings
- Managing Paper
- Managing Your Day, Week, Month, & Year
Why Talk About Time Management & Technology?

- How Many Could Use More Time?
- How Many Have Missed A Bar Deadline?
- How Many Have Forgotten A Task – Perhaps Right After The Phone Call?
- How Many Feel Out Of Control Some Days?
- How Many Wonder How You’ll Manage Your Bar Presidency, Keep Your Family Happy, Maintain Your Law Practice, & Actually Enjoy The Year?
Think Of The Most Productive People You Know

- Are They Really Smarter?
- Do They Work Harder Than You, Or Just More Efficiently?
- Or Are They Just Better Organized, Better Time Managers, And Maximizers Of Proven Technologies?
But Who Is This Guy From Indiana?

- Lessons From Managing Technology At My Firm
- Lessons From Managing My Own dot.com
- Lessons From Years Of Bar Leadership
- Lessons From National Litigation Experience
- And . . .
My Goals Today

- Implement At Least 5 Of My Tips Next Week
- Implement 5 More Next Month
- Then Email Me 1 Of Your Own Tips

NOTE: although we’ll discuss some hardware and software that you might not use presently, most of our focus will be on common sense, practical tips on maximizing what you already have
The New Culture & New Bar Expectations

- The Increasing Pace And Volume Of Bar Communication
- Staff
- Members
- Volunteers
- Third Parties
- Virtually All Use Technology To Communicate
- Most Expect Amazon.Com Turnaround
So How To Keep Up?

- Maximize The Basic Technology – Phones
- Enhance (While Simplifying) Your Use Of Email
- Embrace Other Technology Tools
Many Bar Leaders Have No Real Plan For Handling Incoming Phone Traffic

Tip # 1: Devise A Plan That Works For You

Who Will Answer – a person or vmail?

How Do You Get Your Messages?

Do You Have Voice-Mail?

What Message Is On It?
More On Phones

- Tip # 2:
- Consider Driving Callers Away From Phone Calls & Towards Email
- Phones Are Inherently Inefficient For Most Communication
- Phone-Tag Is Inevitable
- Vmails Are Slow To Retrieve, Hard To Manipulate
How To Do This

- Tip # 3: Have Staff Drive Callers To Email
- Or Have Staff Take A Message & Email It To You
- Have Your Email Address On Your Vmail Message As The First Option
- The Benefits? - Easier To Reply Or Delegate, Plus Better Record Of What Occurred
Have You Checked Your Vmail Message Lately

- Tip # 4: Create A New Vmail Message Every Day
- Why?
- Sets Client & Bar-Related Expectations
- Informs Them How To Proceed Without Your
- Result: Less Frustration For All
Tip # 5: Enhancing Phone Use

- Use A Headset (You’ll Find Yourself On Some Boring Bar Conf. Calls – This Allows Multi-Tasking)
- Don’t Use Speakerphones (if you do, get a high-quality “spider” phone)
- Polycom – Good Supplier
- www.hellodirect.com
- Use Services Such As www.1800conference.com or www.soundpathconferencing.com
What About Cell Phones?

- Tip # 6
- Who Gets The Number?
- Use A Good Headset or Bluetooth
- Have Cell Vmail & Direct Them To Page Or Email
- Warning: Once Someone Has Your Cell #, They Will Use It
- Have An Extra AC Charger With You Always
- And A Car Charger
- And A Back-Up Battery
What About Email?

- If Managed Properly, A Great Tool For Bar & Client Matters
- If Mismanaged, An Unsuccessful Year, Unhappy Bar Staff, Unmotivated Bar Leaders, Unsatisfied Clients
- Tip # 7: Manage Email Before It Manages You
Email – The Monster

The Problem

- Ever-Increasing Volume
  - Clients
  - Courts
  - Counsel
  - Staff
  - “anyone have Colts/Patriots tix”?
  - Useless replies, surreplies, sur-surreplies
  - Spam
  - Imagine 20 years ago managing 50-500 incoming letters or memos daily with response expected same or next day on most!

- Greater need to find and manage what you’ve received
How To Do This?

- Tip # 8: Think Of Your Email As Your File Room
- Create Multiple e-Folders
- For Clients
- For Firm Admin
- For Bar Matters
- And Then Subfolders
More On E-Folders

- Have A High Priority Folder
- Have A Phone Message Folder
- And Sub-Divide Further Where Appropriate
- E.G., For Board
  - Agendas
  - Minutes
  - Resolutions
Creating Rules To Maximize Your Email Experience

- Tip #9 Folders Are Important, But Without Rules You’re Left Still With One InBox & Manual Moving Of Email
- You Can Make Rules By Subject Line Text, Sender, Recipient, Etc.
- Have A Folder & Rule For Emails From Key Bar Staff
Tip # 10: The Importance Of A Good Subject Line

- Never Leave Subject Line Blank
- Use Your “Rule” Terms, Plus More Detail
- Use AN for Action Necessary
- Use NAN or FYI When No Action Necessary
- Indicate When Action Is Due IN THE SUBJECT LINE
- E.g, AN John Board Resolution Due 3.25
- Remember Someday You’ll Be Hunting For This Email Or Its Attachment
Tip # 11 - Warning! Danger Will Robinson!

- You must train your team to follow these protocols!
- This includes Bar Staff, Bar Leaders, & Your Office Staff
- You can also train your clients
- And even your family
Tip # 12:
A Few Simple Email Tips

- Use The Unread Button
- Use The Change To Feature
- Learn The Power Of Right Clicking
- Use The High Priority Option When It Is, In Fact, A High Priority

Reading Pane will save hundreds of clicks daily, thousands weekly, hundreds of thousands annually, millions each decade

And will save minutes daily, hours monthly, weeks yearly, months through your career
Tip # 13 – Email Address Book

- Get Group Addresses In Place & Use Them
- If You Can’t Communicate On Your Own With Your Bar Staff and Bar Leaders, You Won’t Do So As Often Or As Effectively
- Best Thing I Did As IBA Bar President Was To Frequently Update Staff and Leadership By Email
- They Felt Like I Was Engaged, So They Were More Engaged
What About Auto Replies?

- Tip # 14: Use Auto Replies When You’ll Be Out For A Full Day Or More To Help Set Bar & Client Expectations
- Plus You Can Re-Direct Inquiries To Staff Or A Colleague
- But Don’t Need As Often If You Have Email On Your Hip Or Laptop
Tip # 15 – Cutting Email Volume

- Tip # 15: Major Challenge Is Limiting Volume!!
- How To Do This?
- Direct team to send you less
- Get off lists that you no longer want
- Use effective filtering
- Block known abusers yourself
- Automatically direct some ministerial email to staff to handle (e.g., for me pro bono inquiries)
- Make your work email address less available
- Careful what you reply to, and whether you reply to all
- Consider stating No Reply Necessary in informational emails you send
- Institute rules prohibiting “thanks” replies
What Other Technology?

- Tip # 16: PDFs Instead Of Faxes
- Scan Incoming Paper Mail – Allows For Quicker, Easier Communication
- Can Forward To Bar Staff, Volunteers, Etc
Tip # 17:
Maximizing the Internet

- Have High-Speed Connectivity At Home & On Road
- Open Up Multiple Browsers At Start Of Day e.g.:
  - www.google.com
  - www.abanet.org
  - www.martindale.com
  - www.findlaw.com
  - www.law.com
  - www.indybar.org
  - www.inbar.org
  - www.fedlawclerks.com
Tip # 18: Avoiding Paper

- Avoid Paper Like The Plague
- Stop Generating Paper (Exception – Notebook With Key Bar Materials To Always Have With You – By-Laws, Minutes, etc.)
- Don’t Paper File Things You Have Electronically
- And Convert Paper To Electronic Medium When Keeping Something
- Never Touch Paper More Than 1x, Certainly Not More Than 2x
- Create Customized Post-It Notes
Tip # 19: More On Paper

- Paper Is The Evil Of Time Management & Productivity - Laptops & PDAs Are The Solution
- Never Take A Paper Note Again - NEVER!!!!!!!!!!!!!!
- ALWAYS Have A Laptop
- Take Organized, Brief Notes - But Use TASK As Your Keyword, And Assign DATE And STAFF or VOLUNTEER For Accountability
- Immediately After Meeting, Get Notes To PC, Calendar Dates & Tasks, & Email To Whomever Needs Them
- Don’t Depend Exclusively On Bar Staff For This!
Tip # 20: Limiting Meetings

- Meetings, Like Paper, Are A Time Management Black Hole
- Avoid Meetings When Possible
- Ensure Start & Stop Time and Agenda
- Get Meetings Started On Time, and End Them On Time
- Ensure Reminders Go Out 5 Days & 1 Day Prior
- Consider PowerPoint For Your Agenda
Tip # 21: Planning

- Plan Your Year Now
- Pick Leaders Now
- Pick Events & Speakers Now
- Write A Few “Stock” Prez Columns
- Schedule Vacations, Doctors’ Appointments, etc. Well In Advance
- Protect Your Mondays So You’ll Keep Your Weekends
- Protect Board & Member Meeting Days
- Schedule Regular Bar Time
Tip # 22 - Scheduling

- Control Scheduling Of Bar Meetings You Must Attend – Go From One To The Next Back to Back
- Utilize Breakfast, Lunch, or End Of Day If You Only Have One Bar Item On A Day
Tip # 23

- Have Simple Note Cards For Quick Thank Yous, and Do Them Either Same Day Or On Weekend
- Empower Others To Fill In For You
- Have Master Bar To-Do List You Review/Update At Least Weekly
Tip # 24 – Exec Director

- Don’t Play Executive Director
- Connect with Executive Director When You Have Down Time Otherwise (e.g., in car)
Tip # 25

- The More You Thank, Remind, Prod, Congratulate, Follow-Up With, & Generally Just Stay Continually Active With Your Volunteer Leadership & Staff, The More They Will Do & The Better They Will Do It

- This Doesn’t Mean Micro-Manage
- But It Does Mean Constant Leadership & Attention
- It Will Bring Success & Sanity
- Have Fun – It’s The Best Year Imaginable!
Closing Thoughts & Questions