

# Get More Things Done with a ToDo System

By Wells Anderson

If managing all of the work that needs to be done in a law office seems daunting now, just wait. Things will not get better by themselves as the number and complexity of legal issues continue on to grow. The economics of law practice also dictate that lawyers get used to handling high volumes of work.

Systematic tracking of tasks on the computer seems to offer an efficient solution to the problem of work overload. But many who have tried this have failed.

## A. What Is Wrong with Most Computerized ToDo Lists?

1. They get too long.
2. Long lists are discouraging, so you avoid them.
3. Crossing things off is too time-consuming.
4. You lose sight of them.
5. They don't help you actually do the work itself.

## B. What Is Wrong with Paper ToDo Lists?

1. Only one person has the list.
2. Crossed out items get in the way.
3. They have to be rewritten.
4. Using one master list is confusing because it mixes tasks for different clients.
5. Using one list for each client is confusing because there are too many lists.
6. They leave no good record of what we have done.
7. They are poor tools for delegating work.

## C. ToDo List Best Practices: *Getting Things Done*

The book, *Getting Thing Done*, sets forth an number of key ideas that build on the work done by Steven Covey in *The Seven Habits of Highly Successful People*.

- 1. Process everything as it comes in.**
- 2. If it takes less than two minutes, do it now.**
- 3. Toss, file, delegate or defer everything else.**
- 4. Defer by placing events on the calendar and tasks on lists or in tickler files.**
- 5. Group deferred tasks by the place where you'll do them.**
- 6. When writing down a task, describe the next actual step.**
- 7. Review and revise each list once every week.**

A main goal of Allen's approach is to clear your mind of everything except what you are working on. You need to trust your system to remind you rather than relying on your memory. He describes an approach that moves you away from using files, sticky notes or documents that you leave on your desk as visual reminders of what you need to do.

Allen's best practices can be used with computerized ToDo lists to overcome their shortcomings. By using the above principles and a carefully customized computer system, you can overcome most of the things that are wrong with both computerized and paper ToDo lists.

#### **D. ToDo's and Delegation with Time Matters Software**

Time Matters<sup>®</sup> software can be customized to implement the *Getting Things Done* approach. A crucial advantage of using a practice management system's ToDo function is that it links ToDo's to legal matters. These links allow you to display a view of your ToDo's that is just right for the work you are doing at the moment.

##### **1. Planning Your Week and Your Day**

Time Matters can filter and display ToDo's in a variety of ways. For example, you can have tabs that show your ToDo lists for a given period. Tabs can filter the ToDo's so that you can focus on one or more categories of tasks. These lists or views are valuable aids to planning your week and your day.

##### **2. Working on One Matter**

Time Matters can also list the ToDo's for any matter. Each matter has a tab that quickly displays related records including ToDo's. Another tab shows a Timeline for the matter. A Timeline can show

ToDo's, Events, Notes, and a variety of other records relating to the matter listed in chronological order.

### **3. Delegating Work to Others**

It has been said that there is no limit on the amount of work you can do if other people do it for you. While the realities of managing people place limits on what you can do through others, an effective tool for delegating and tracking your delegations increases those limits.

The ToDo function in Time Matters can be customized to assign tasks to other people. Tabs can be configured that show each individual what he or she has to do. Other tabs can show the delegating attorney what he or she has delegated, to whom, and when the ToDo's are due.

These Time Matters' capabilities allow you to implement David Allen's ideas on doing, delegating, deferring and planning.

### **E. Getting Started with ToDo's**

If you want to get started with a new system for managing ToDo's in your office, a good first step is to purchase David Allen's book, *Getting Things Done*. When you become a believer in applying his techniques, you may decide that tracking ToDo's on the computer makes sense in your office. Allen does not preach for or against computerization but does admit that he finds his Palm organizer an extremely valuable tool.

A next step might be to implement a practice management system like Time Matters in your office. Currently the only options for customizing Time Matters in accordance with *Getting Things Done* principles are to do it yourself or to work with a consultant. In the future, the author intends to distribute a ToDo Feature Package that can be installed in Time Matters. This add-on will implement the approaches to ToDo's discussed here.

## F. About the Author



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*Helping lawyers leverage technology*

Wells H. Anderson's Minneapolis-based business specializes in Time Matters software, working with firms that want to implement better computer systems. Mr. Anderson focuses on tailoring technology to the particular needs of each law office.

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