



403: Work Smarter, Not Harder-Time Management in the Age of Technology

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Faculty Biographies

Jan Jasper

Jan Jasper is a productivity expert and a CLE-accredited instructor in New York State. As principal of Jasper Productivity Solutions, she helps busy professionals work smarter, not harder. Ms. Jasper is the author of *Take Back Your Time: How to Regain Control of Work, Information, & Technology*. She was recently the national efficiency spokesperson for IKON Office Solutions, Inc. Through her workflow coaching, seminars, and software training, she has helped thousands of people get more done with less effort, manage multiple projects, and save time with technology.

Ms. Jasper has done numerous TV and radio appearances all over North America and is often quoted in print, including ABA's *GP Solo*, *Investors' Business Daily*, *The Christian Science Monitor*, *The Wall Street Journal*, *Reader's Digest*, *Small Business Computing*, and many others.

Ms. Jasper is an associate member of the ABA and is on the board of the National Speakers Association's New York City Metro chapter.



*Work Smarter, Not Harder - Time
Management in the Age of Technology*
(Session 403)

Faculty: Jan Jasper

Author of *Take Back Your Time: How to Regain Control of Work,
Information, & Technology* (St. Martin's Press)

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The in-house bar association.SM

Session 403**Work Smarter, Not Harder - Time Management
in the Age of Technology****Faculty: Jan Jasper**

Time Management

- Productivity - Truth vs. Myth
- The Big Picture – managing multiple matters & deadlines
- Appointment Book Formats
- Daily Details
- Fitting It All In - Tips for Your Personal Life

Managing Information – Essential for Productivity

- Getting Your Professional Reading Done
- Coping With Paper and Desktop Clutter
 - Action files
 - Tickler files
 - More tips for managing paper

Use Technology to Save Time

- Make the Most of Email
- Keeping Track of Matters & Issues
 - Information management software (*Microsoft Outlook, etc.*)
 - Contact Records, Categories
- Go Digital for Maximum Efficiency

Working Efficiently with Others

- Telephone
- Meetings
- Delegating

Final Thoughts

- Your Action Plan (worksheet)
 - Evaluation Form
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Time Management

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Productivity – Truth vs. Myth

Symptom or cause of problem?

- Poor time management, planning, prioritizing
- Dysfunctional file system
- No system for current papers and active projects
- Loose ends - No 'completions'
- Not using technology wisely
 - Multiple, redundant gadgets
 - Too much paper
- Too many interruptions and crises

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Time Management – The Big Picture

- Plan ahead
- Urgent vs. important
- Backwards planning
- Interim mini-deadlines
- Importance of right calendar format
- Make appointments with yourself
- Do it sooner

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Appointment Book Format

Priority for this week: _____

Major Areas of Your Life, Projects, Priorities:

Daily Things To Do

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Appointments

8						
9						
10						
11						
12						
1						
2						
3						
4						
5						
6						

Recommended:

- Planner Pad
- At-a-Glance 'Quad'

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Time Management - Daily Details

- Efficiency vs. effectiveness
- Data dump
- Your peak times - appointments with yourself
- Eliminate 'doublework'
- Spend time now to save time later
- Dealing with interruptions
- Conquering procrastination
- Concentration
- Organize your desk at end of each day

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Fitting It All In

Personal Life? What Personal Life?

- Keep only 1 calendar
- Use small bits of time; work in transit
- Do things before you need them done
- Every evening - prepare for tomorrow
- Simplify
- Multi-purpose activities
- Efficient errands & household chores
- Be selective with leisure time
- Adjust your expectations

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Managing Information – Essential for Productivity

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Getting Your Reading Done

- Information is NOT power
- Tear out articles you want to read
- File articles by area (e.g., IP, SEC), case, or matter
- Carry reading everywhere you go
- Make the most of train & plane time
- Use hi-liter, margin notes
- Share with others
- If the pile keeps getting bigger:
 - Throw out the oldest stuff
 - Schedule time to read

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Action and Tickler files - How to Set Up

For miscellaneous, *current* paper:

- Agenda for upcoming meeting
- Tickets or directions to events
- Association renewal notices
- Itineraries
- Expenses to submit
- Kids' permission slips
- Doctor referrals, prescriptions
- Items to buy; sales flyers
- Bills to pay; birthday card to mail
- Dry-cleaning or parking tickets
- Pending



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Action & Tickler Files – How to Use

- The solution to desktop clutter & lost papers
- Must be vertical and accessible
- Lifecycle of papers
- Identify your next action
 - 'Divide & conquer' mixed materials
- Appointment book is your back-up
- Start by excavating your desk

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More Tips for Managing Paper

- Capture all your ideas and tasks
- The spiral notebook – pros and cons
 - Process and transfer information regularly
- Sticky notes are good for:
 - Quick tasks
 - Flexible scheduling
 - Color-coding papers in project files

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Use Technology to Save Time

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Make the Most of Email

- Your inbox is not an archive!
- Process, then delete whenever possible
 - Keep latest message only
 - Do final clean up-when you close a matter file
- Avoid printing emails – file digitally
- Use detailed subject headers
- In Box as extension of your To-Do List
- Create custom folders
 - Generic, issue, or matter-related
- Encryption - beware public ‘hotspots’

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Custom Email Folders - Outlook



courtesy of Microsoft Corp.

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Keeping Track of Matters & Issues

- Contact or Information Management software
(*Microsoft Outlook; Act, Goldmine, etc.*)
- **Benefits:**
 - Keep records of phone calls
 - Reminders of tasks, follow-ups, and deadlines
 - Cross-linked – update information only once
 - Quicker access to information; no lost notes
 - Less paper to shuffle - saves time
 - Easier for travel and team access
 - Easier to back-up data

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Contact Record - Outlook

The screenshot shows the Outlook contact record for 'Frank'. The contact information includes:

- Full Name:** Frank
- Job Title:** [Blank]
- Company:** Mberg
- File As:** Frank
- Business Phone:** (212) 000-0000
- Home Phone:** [Blank]
- Business Fax:** [Blank]
- Mobile:** [Blank]
- Address:** One Penn Plaza, New York, NY 10119-0165
- E-mail:** [Blank]
- Web page address:** [Blank]

Below the contact information is a large text area for notes. The text reads: "Most people type notes in this window here and don't go any further, missing out on great time-saving benefits!"

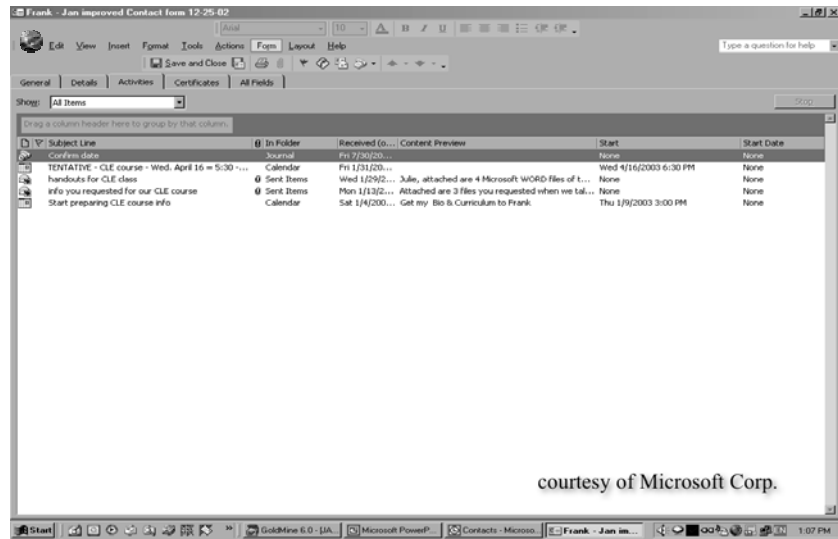
At the bottom right of the notes area, it says "courtesy of Microsoft Corp."

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Contact Activities Tab - Outlook



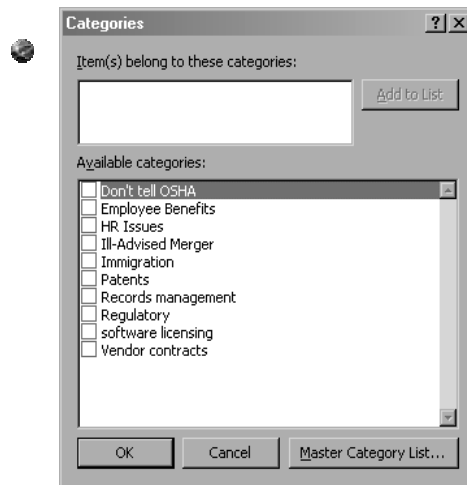
courtesy of Microsoft Corp.

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Create Categories in Outlook for issues or matters



courtesy of Microsoft Corp.

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Go Digital for Maximum Efficiency

- Avoid printing emails
- Internet-based fax service
- Use directories & arrange files by subject or matter - *not* by the program they were created in
- Use “Save As” sparingly
- Specific, detailed file names
 - Area (SEC, OSHA); matter or issue; your initials
- Shortcuts on desktop for quick access to files
- Digital library – Favorites (Bookmarks)

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Working Efficiently with Others

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- Telephone
 - Screen, handle in blocks
- Meetings
 - Preparation
 - Agenda
 - Conclude with detailed action list
- Delegating
 - Don't dump
 - Make sure they understand what's required
 - Use specific subject lines on emails
 - Be clear about deadlines – Set midway check point

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Final Thoughts

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Change Your Habits, Change Your Life

- Greatly improve work product & quality of life
- Takes time and effort– stick with it!
- Be nice to yourself.
- The right way is whatever works for you.
- A support system helps.

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Your Action Plan *Today's date* _____

- What am I already doing well?
- In what areas can I improve?
- What are the 3 main things I learned that I can begin to apply right away?
 - 1)
 - 2)
 - 3)
- What would I like to implement in the future?

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Evaluation

Work Smarter, Not Harder: Time Management in the Age of Technology

- Course content (circle one) *Excellent* *Good* *Fair* *Poor*
- Instructor quality (circle one) *Excellent* *Good* *Fair* *Poor*
- Written materials (circle one) *Excellent* *Good* *Fair* *Poor*
- What did you like best about this course?
- How could the instructor improve this course in the future?
- Additional comments/suggestions