



Technology to Tackle Your Day

Simple solutions to make your job easier

About Me



Legal Learning
DEVELOPMENT NETWORK

Michelle Spencer, Founder

@txmischief

Semi-Geek

L&D Nerd




Summary



Legal Learning
DEVELOPMENT NETWORK

THE PROCESS



Legal Learning
DEVELOPMENT NETWORK


PEOPLE, INFORMATION AND TASKS



Legal Learning
DEVELOPMENT NETWORK

NO MISSED DEADLINES

Bases covered. Tasks managed.



Legal Learning
DEVELOPMENT NETWORK

INFORMATION MANAGEMENT

Out of your head. Sorted. Searchable.



Legal Learning
DEVELOPMENT NETWORK

SCHEDULING

Automation + Simplification



Legal Learning
DEVELOPMENT NETWORK

PROJECT MANAGEMENT

Map it out. Communicate it.



Legal Learning
DEVELOPMENT NETWORK

THE PROCESS

Who do you want to be?





What's your
game plan?

PULLE

WALCZAK
ATHROW

CUNNINGHAM

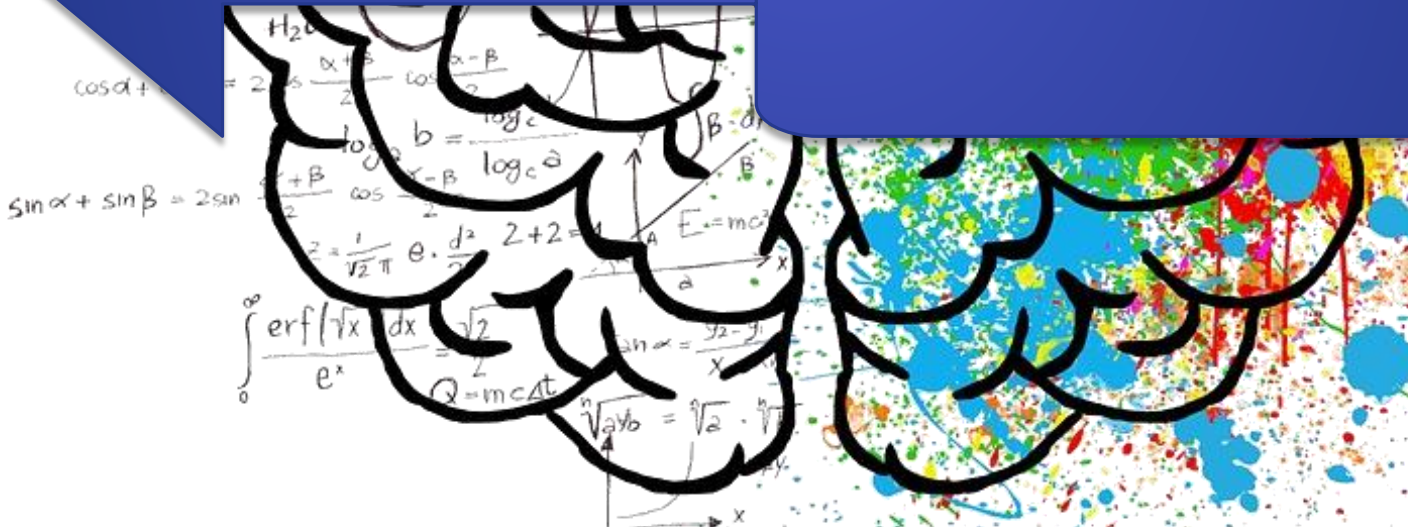


**TIME
OUT!**



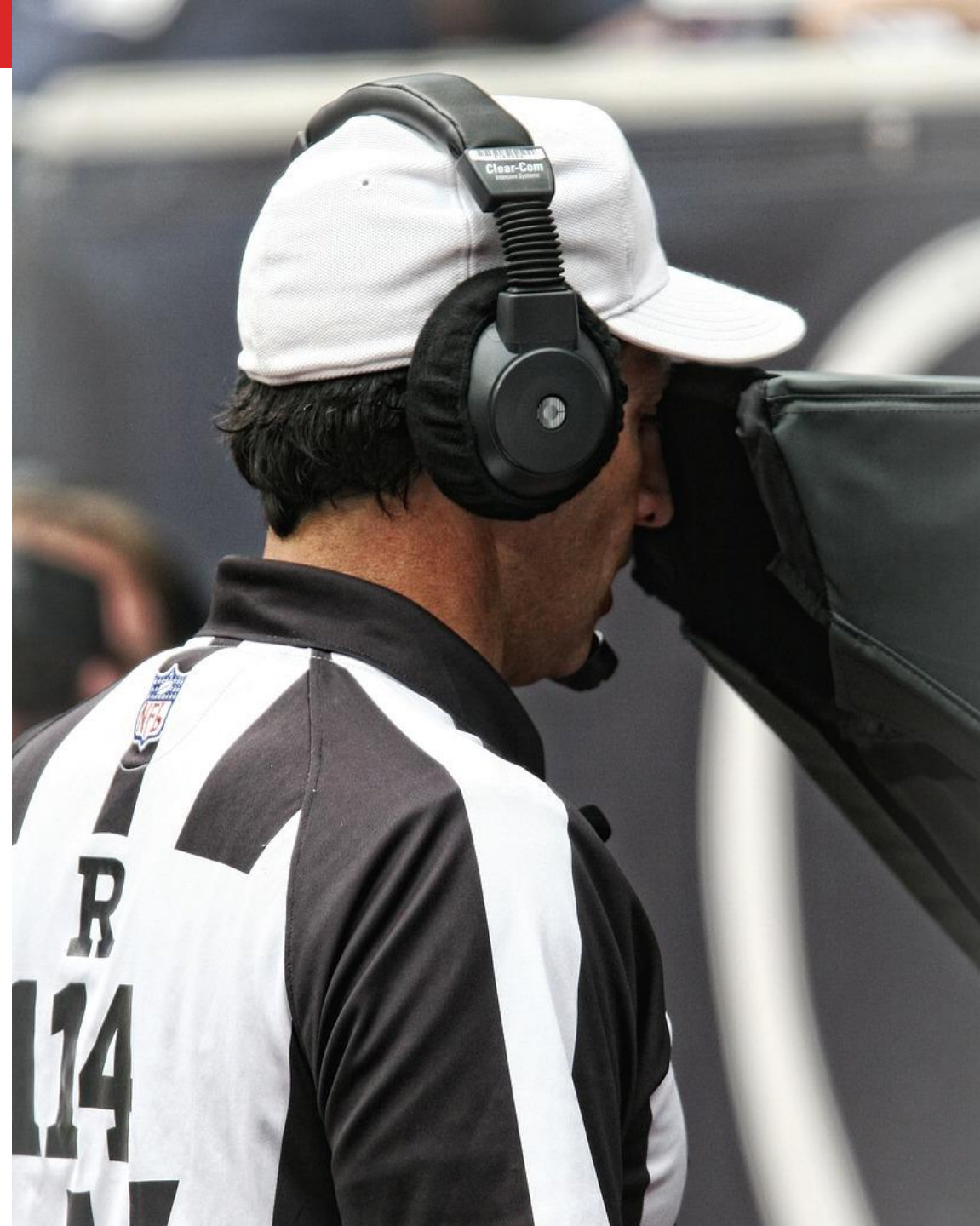
REACTIVE

INQUISITIVE





Instant Replay





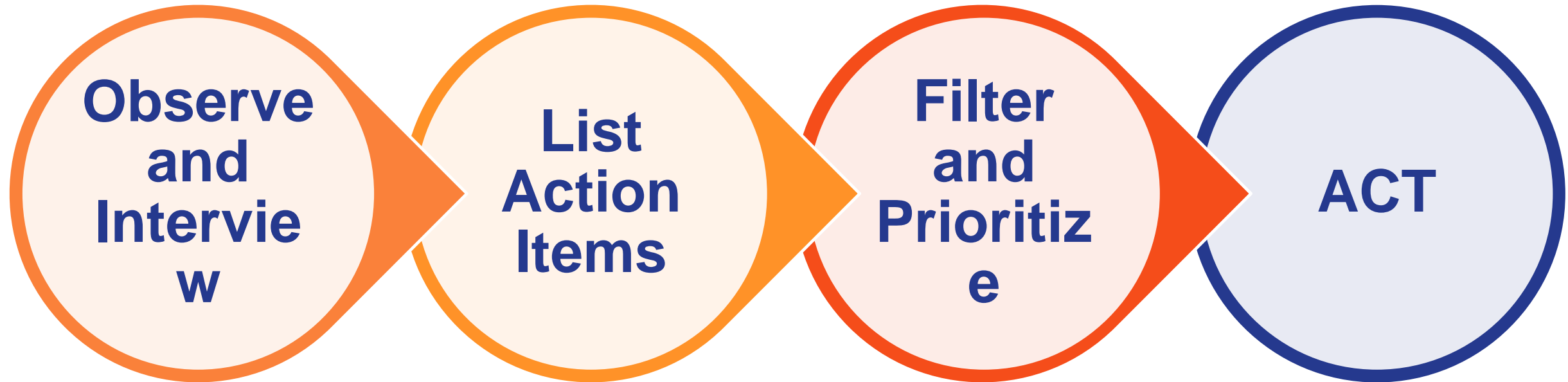
**If it's repetitive and annoying,
you're doing it wrong.**

-Barron Henley

ABA Techshow 2017



Finding the Gaps





4 Areas of Management







4 Areas of Management





Legal Learning
DEVELOPMENT NETWORK

PEOPLE,
INFORMATION AND
TASKS



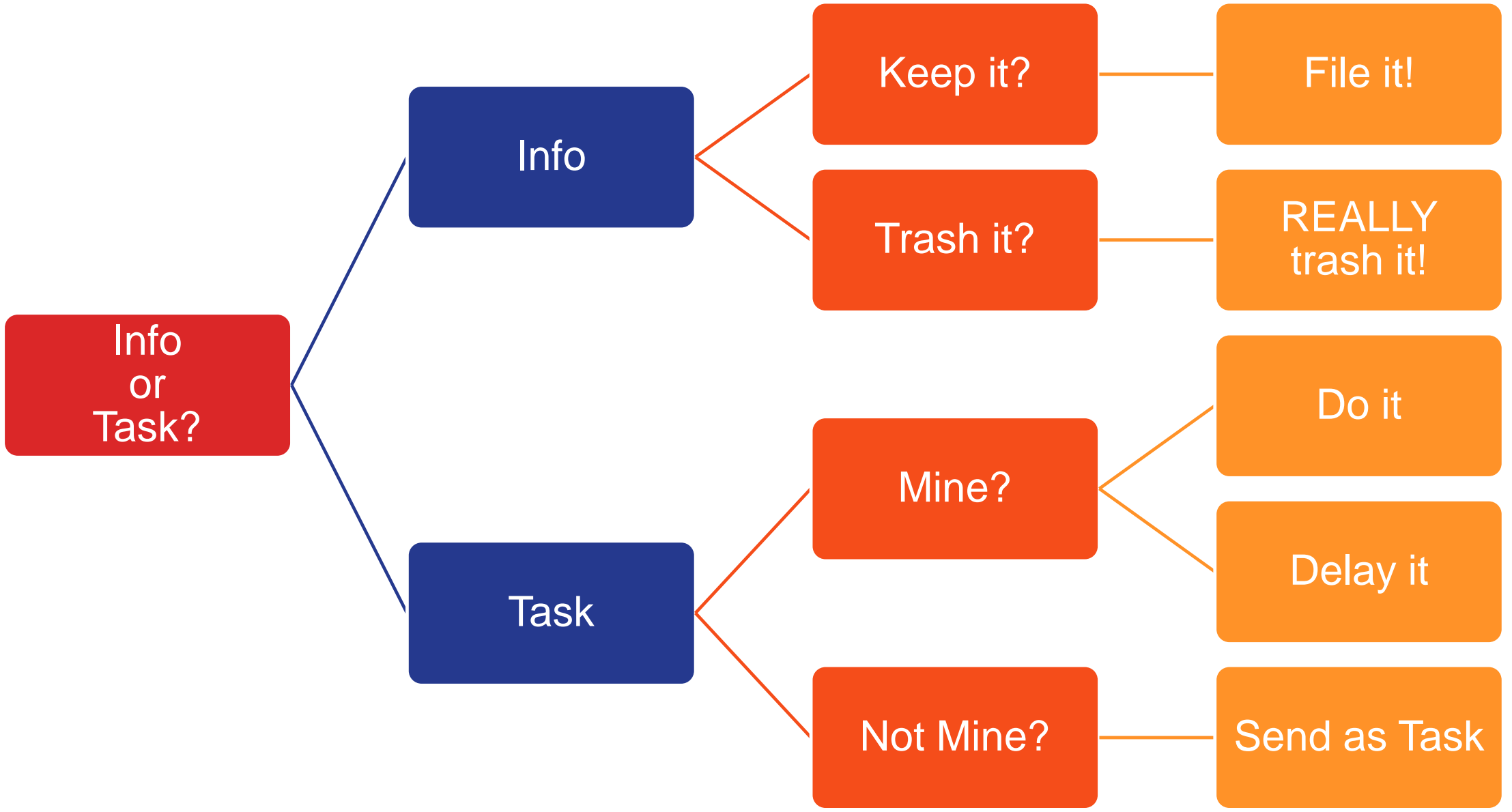


Managing Information and Tasks

- Reactive Mode
- Getting it ALL out of your head
- Can't work from anywhere if you're dependent on paper
- Incoming!
 - Faxes/Letters
 - Filings
 - Calls
 - Emails
- What actions need to be taken?



Throw it
or
Keep it?





Why Tasks?

- Contains specific details
- Signals importance
- Sets deadline
- Trackable



Legal Learning
DEVELOPMENT NETWORK

CAVEAT TECHNO

Drowning in Options



Legal Learning
DEVELOPMENT NETWORK

NO MISSED DEADLINES

Bases covered. Tasks managed.



Outlook Tasks

My Tasks

To-Do List

- Tasks - Michelle@legallearningnetwor...
- Tasks - Support
- Tasks - Accounting
- Tasks - Information
- Tasks - Receipts

Search To-Do List

Arrange by: Categories | A to Z ▲

Type a new task

- ▲ (none)
 - 3-Step SEO Strategy for Lawyers (Marketing) ▶
 - Jeena Cho Course on Mindfulness ▶
 - How to Survive any Training Change (Blended Learning) ▶
 - Course/Blog/Session Idea: Design Thinking Meets Instructional Design ▶
- ▲ Client Work
 - Prepare Forte training materials ▶
- ▲ Presentation
 - State Bar Presentation ▶

i Due in 9 days.

Client Work

Subject Prepare Forte training materials

Due date Starts on 6/14/2017, due on 6/23/2017

Status In Progress Priority High

Owner Michelle Spencer

My Tasks

To-Do List

- Tasks** - Michelle@legallearningnet...
- Tasks - Support
- Tasks - Accounting
- Tasks - Information
- Tasks - Receipts

Search Tasks

<input type="checkbox"/>	<input checked="" type="checkbox"/>	SUBJECT	DUE DATE	% COMPLETE	COMPANY	ASSIGNED TO	CATEGORIES
Click here to add a new Task							
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pay Quarterly Taxes	Thu 6/15/2017	0%			Financial
<input checked="" type="checkbox"/>	<input type="checkbox"/>	State Bar Presentation	Fri 6/16/2017	75%			Presentation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	State Bar Handout	Fri 6/23/2017	50%			Presentation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Prepare Forte training materials	Fri 6/23/2017	25%			Client Work



Task Details

The screenshot displays the Microsoft Task pane interface. At the top, the ribbon is set to 'Task'. Below the ribbon, the 'Task Details' ribbon is active, showing various task management options. The task details form includes fields for 'Subject', 'Start date', 'Due date', and 'Reminder'. The 'Status' is set to 'Not Started' and the 'Priority' is 'Normal'. Two checkboxes are checked: 'Keep an updated copy of this task on my task list' and 'Send me a status report when this task is complete'. The 'To...' field is empty.

Field	Value
Subject	
Start date	None
Due date	None
Reminder	Mon 1/8/2018
Status	Not Started
Priority	Normal
% Complete	0%

- Keep an updated copy of this task on my task list
- Send me a status report when this task is complete



Gmail Tasks

Tasks: M. Spencer's list – ↗ ×

[◀ Back to list](#)

Task Title

Due date



Notes

Move to list ▼

[◀ Back to list](#)

Actions ▶





Next Level: Kanban





Next Level: Kanban



- Waiting on Atty/Staff
- Waiting on Others
- Prospects



Microsoft Planner

Favorite plans

Office move

9 tasks left

7 days left

5 Not started | 2 Late | 2 In progress | 9 Completed

All plans

Launch Engineering

Marketing Campaign

Board | Charts

To do

- Build registration page (10/22)
- Test registration page (10/31)

Insights and Reports

- Determine data refresh frequency (10/22) - Molly Dempsey
- Proof of concept workshops (10/30) - Fabrice Canel
- User acceptance testing (10/19) - Bonnie Kearney

Lead Management


- Hire staff to manage leads
- Sample_Adoption_Plan.docx (10/22) - Sara Davis
- Finalize lead management strategy



Microsoft Planner Task Details

Registration ▾ Not started ▾ Start date ▾ Due 10/22 ▾ ...

Build registration page

Created by Sara Davis Bonnie Kearney 

Description


Attachments 0

Attach Link

Comments 2

Add a comment

Post

 Molly Dempsey 2:18 PM
Task [Build registration page](#) assigned to Bonnie Kearney



Planner: *Assigned to View*

Notebook ...

Group by Assigned to

Molly Dempsey	Alex Darrow	Bonnie Kearney	Fabric
<p>Determine data refresh frequency Insights and Reports 10/22 Molly Dempsey</p>	<p>Pick the right BI platform Insights and Reports 10/15 Alex Darrow</p>	<p>Build registration page Registration Reg.docx</p>	<p>Proo Insig Prese Final</p>

The image shows a Microsoft Planner interface with a grid of tasks. A red box highlights the 'Group by Assigned to' dropdown menu at the top right. Another red box highlights the column headers for 'Molly Dempsey', 'Alex Darrow', and 'Bonnie Kearney'. The tasks are organized into columns based on the assignee. The first column (Molly Dempsey) contains two tasks: 'Determine data refresh frequency' (due 10/22) and 'Slot leads into sales funnel' (due 12/19). The second column (Alex Darrow) contains one task: 'Pick the right BI platform' (due 10/15). The third column (Bonnie Kearney) contains one task: 'Build registration page' (with a document icon 'Reg.docx'). The right side of the interface shows a partial view of another column for 'Fabric' with task titles like 'Proo', 'Insig', 'Prese', and 'Final'.



Planner: *Chart View*

MC Marketing Campaign

Board **Charts** Notebook ...

Status

15 tasks left

- 5 Not started
- 5 Late
- 5 In progress
- 0 Completed

Members

Member	Not started	Late	In progress	Completed
Unassigned	0	0	0	0
Molly Dempsey	1	1	0	0
Alex Darrow	1	1	0	0
Bonnie Kearney	1	2	0	0
Fabrice Canel	0	1	1	0
Garret Vargas	1	0	1	0
Janet Schorr	0	1	1	0
Sara Davis	0	0	1	0

Tasks

Group by No grouping

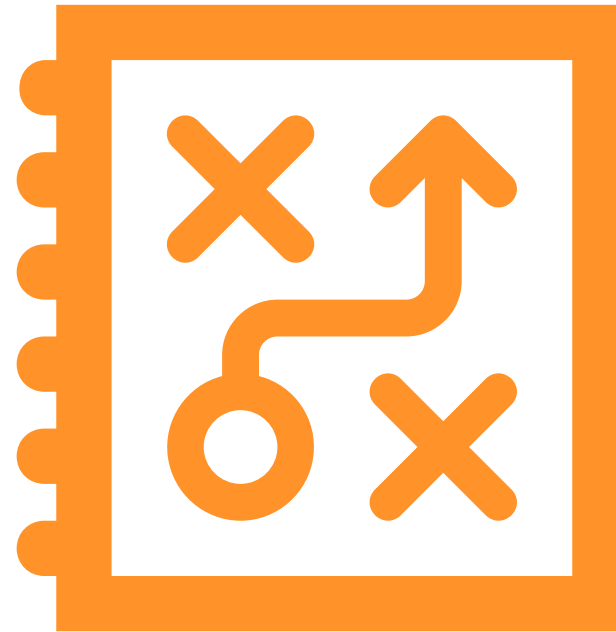
- Test registration page
Registration
10/31
- Build registration page
Registration
1 10/22
- User acceptance testing
Insights and Reports
10/19
- Paid media advertising budget analysis
Content creation
11/13
- Record webcasts
Content creation
1 10/22

Bonnie Kearney
Late: 2



Other Workflow Tools

- Trello
- Asana
- LeanKit
- Lawcus
- Taskworld





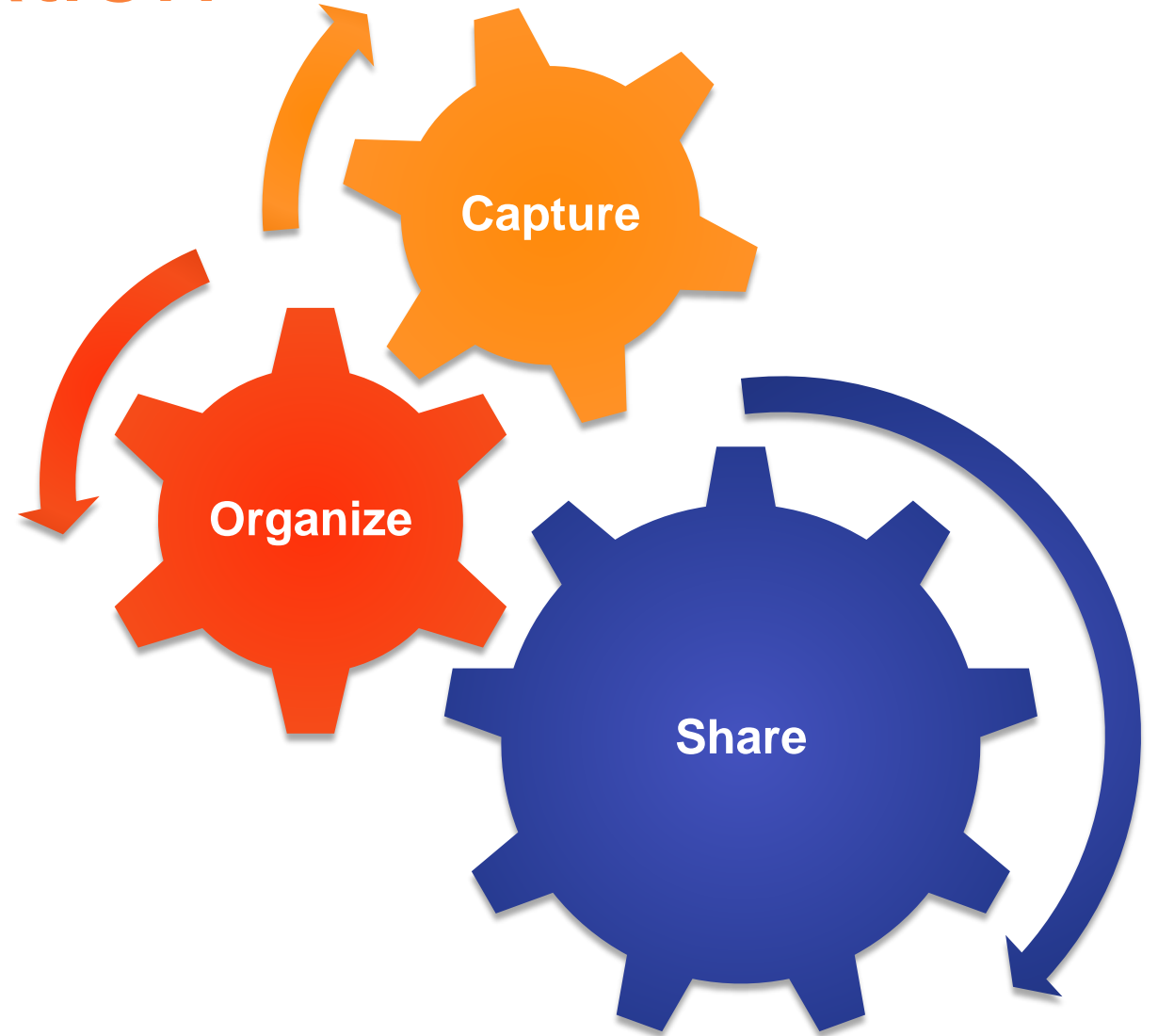
Legal Learning
DEVELOPMENT NETWORK

INFORMATION MANAGEMENT

Out of your head. Sorted. Searchable.



Managing Information



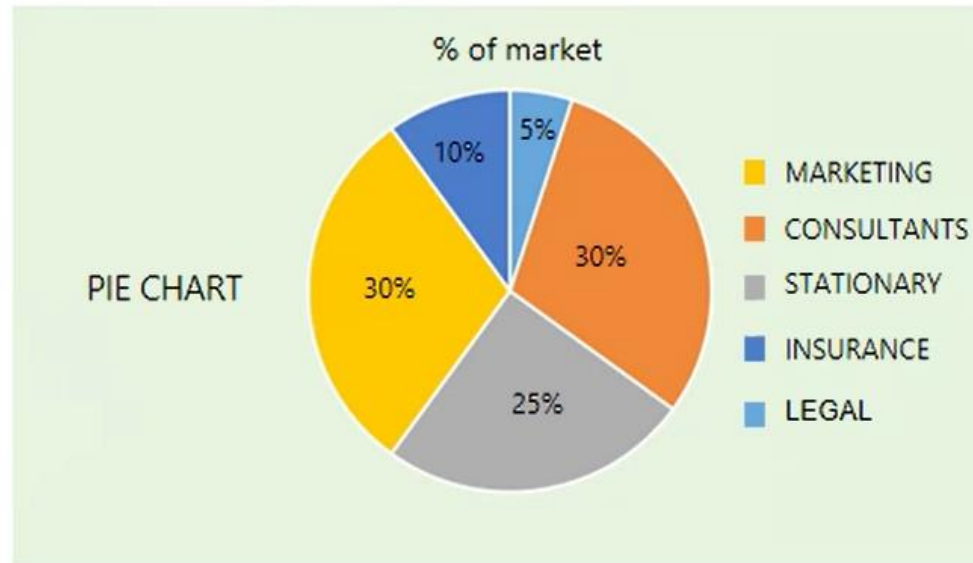
OneNote Structure

Business > Budget

- Section
 - Travel
 - Pitch
 - Budget**
 - RFPs
 - Potential Contacts
 - Research
- Page
 - How to Budget
Learn proper budgeting skills with this guide to making a budget. 12 steps on how to
 - Estimating Startup Costs
A realistic startup budget should only include those things that are necessary to start a business.
 - Startup Expenses
Biggest Cost
Marketing
Consultants
 - Joe's Presentation
I think we should dream bigger.
 - Leanest Budget
If Murphy's law prevails and we're prevented from amassing the number of investments once

Startup Expenses

Friday, October 11, 2013 4:22 AM




Biggest Cost
-Marketing
-Consultants

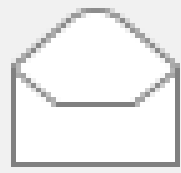
- Acctg-Expenses
- Product Development
- Marketing
- Selling
- Partnerships
- Competitors
- Consulting
- Website
- Forums
- Blog
- Podcasts
- Newsletter
- Tips
- Vendors
- OFFICE 365




Other Great Features






Meeting
Notes



Email
Page



Tag
▼

-  To Do Tag
-  Find Tags
-  Outlook Tasks ▼

Tags



Legal Learning
DEVELOPMENT NETWORK

SCHEDULING

Automation + Simplification

Appointment Scheduling



1

E-mail
Calendar

- Busy
- Out of Office
- Tentative
- Working Elsewhere
- Free
- Outside of Working Hours

June 2017

Tue, Jun 20

<input type="checkbox"/>	Before 8:00 AM	Outside of Working Hours
<input type="checkbox"/>	8:00 AM – 11:00 AM	Free
<input checked="" type="checkbox"/>	11:00 AM – 11:30 AM	Busy
<input type="checkbox"/>	11:30 AM – 1:00 PM	Free
<input checked="" type="checkbox"/>	1:00 PM – 2:00 PM	Busy
<input type="checkbox"/>	2:00 PM – 6:00 PM	Free
<input type="checkbox"/>	After 6:00 PM	Outside of Working Hours

3

Wed, Jun 21

<input type="checkbox"/>	Before 8:00 AM	Outside of Working Hours
<input type="checkbox"/>	8:00 AM – 1:00 PM	Free
<input checked="" type="checkbox"/>	1:00 PM – 5:00 PM	Out of Office
<input type="checkbox"/>	5:00 PM – 6:00 PM	Free
<input type="checkbox"/>	After 6:00 PM	Outside of Working Hours

2

Send a Calendar via Email

Specify the calendar information you want to include.

Calendar:

Date Range:

Start: End:

Detail: **Availability only**
Time will be shown as "Free," "Busy," "Tentative," "Working Elsewhere," or "Out of Office"

Show time within my working hours only [Set working hours](#)

Advanced:



FindTime

1

New Meeting Poll
FindTime

To...
Cc...
Subject

Michelle Spencer, Founder

Legal Learning
DEVELOPMENT NETWORK

michelle@legallearningnetwork.com
512.922.5551 | [LinkedIn](#) | [@txmischief](#)
LegalLearningNetwork.com | [@LLDevNet](#)

FindTime

New meeting poll

Duration
1 hour Work Hours

June 2017

12 13 14 15 16

Friday 16 June

Sort by Availability | Time

8:00 AM	2 selected	
8:30 AM	0 selected	
9:00 AM	0 selected	
9:30 AM	0 selected	

2 times selected

3

4

To...
Cc...
Subject

Send

FindTime

You're almost done!

Hit Send to let the voting begin.

Notifications	ON
Auto schedule	ON
Holds	ON

You are invited to a meeting

Organizer Michelle Spencer

Duration 1 hour

Location Online Meeting

When 2 options provided

Invitation created with FindTime

View your invitation and voting status [here](#)

Monthly Meeting

Poll initiated by John | 👤 1 | 💬 0 | ⌚ less than a minute ago

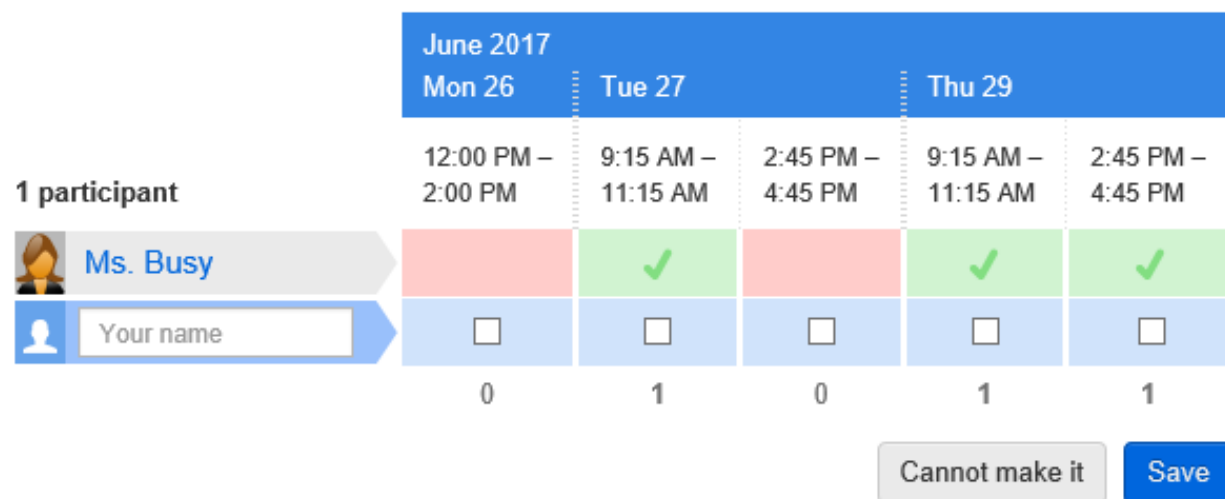
When do you have time for our monthly meeting?

Table view



This is an example date/time poll.

[Learn more ...](#)





Other Calendaring Tools

- *Schedule Once*
- *Calendly*
- *Apptoto*
 - Reminders only
 - Clio integration



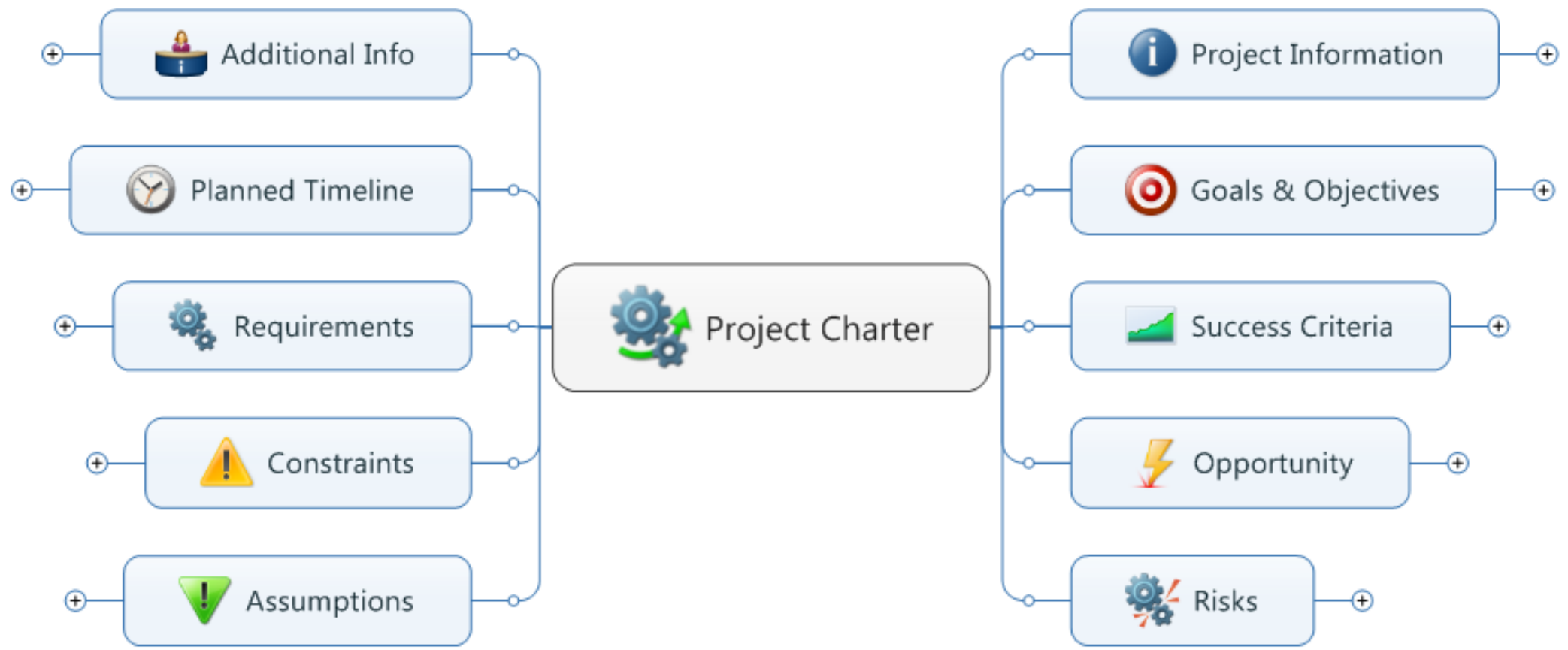
Legal Learning
DEVELOPMENT NETWORK

PROJECT MANAGEMENT

Map it out. Communicate it.

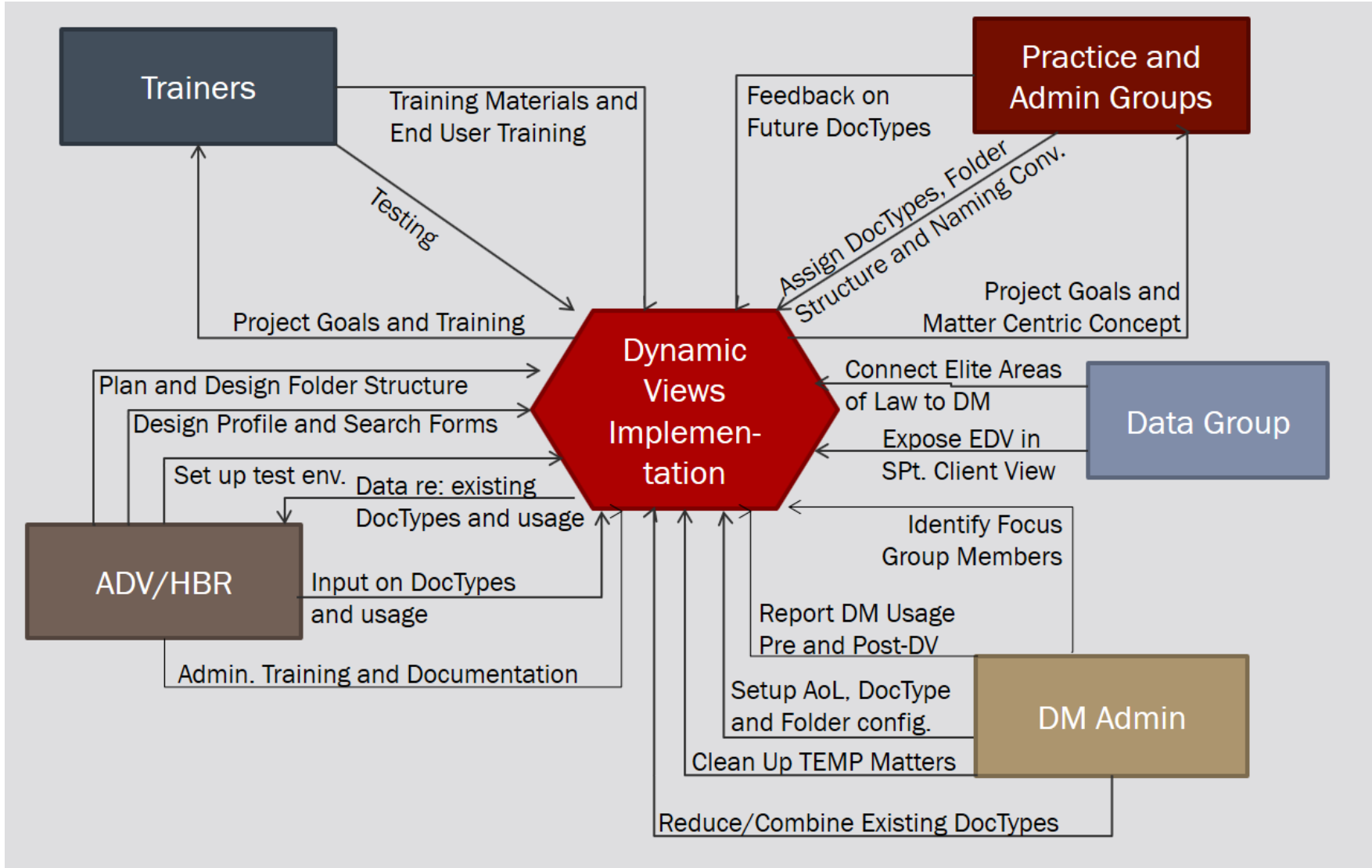


Project Charter





Project Scope Diagram



Lists, lists, lists

The screenshot displays the Microsoft Excel interface. The ribbon is set to the 'Design' tab, and the 'Format as Table' button is highlighted with a red box. Below the ribbon, the worksheet shows a table structure with columns A through G. The 'Due Date' column (D) is highlighted with a red box, and a green selection box is visible around it.

	A	B	C	D	E	F	G
1	Task	Task Owner	Helpers	Due Date	Comments	Complete Y/N	Completion Date
2							
3							
4							

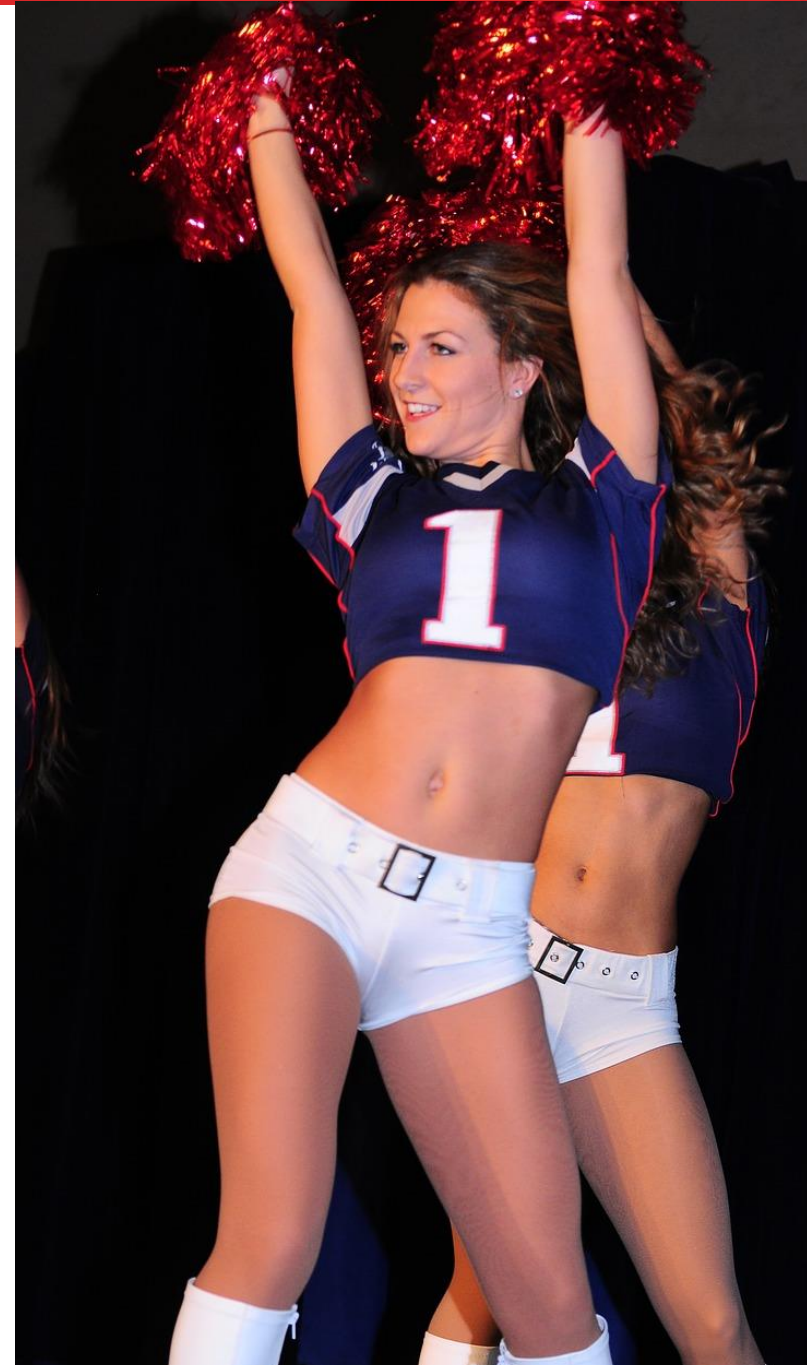


Communication Plan

- Layout critical emails at the outset of the project
 - Time to focus
 - Details don't get missed
 - Content is clear and concise
- Save emails to:
 - Drafts folder in Outlook/Gmail
 - OneNote/Evernote



Action, action, we want
action! A-C-T-I-O-N!





Q&A

What questions do you have?



Legal Learning
DEVELOPMENT NETWORK

@TXMischief / @LLDevNet /

Michelle@LegalLearningNetwork.com
