Technology to Tackle Your Day

THE PROCESS

To start, you must stop working IN your business long enough to work ON your business.

You have to get out of day-to-day reactive mode long enough to get into an inquisitive mindset in order to identify your greatest needs and what the best solutions will be.

Observe your day-to-day work. Look for those annoying repetitive tasks and areas where you're still working on paper. Next, compile a list of concerns and potential action items. This can be a big list, so don't get discouraged or overwhelmed. Use a spreadsheet to filter and prioritize which items to tackle. Finally, decide what actions to take in what order.

4 Areas of Management

Take a moment to reflect on each of these areas. Which one jumps out at you as your primary area of concern? Which one feels like it's hit-or-miss or out of control? Focus on one area to start. Is it day-to-day tasks or bigger projects? Perhaps it's the sheer amount of incoming information and how to organize it?

HANDLING INFORMATION AND TASKS
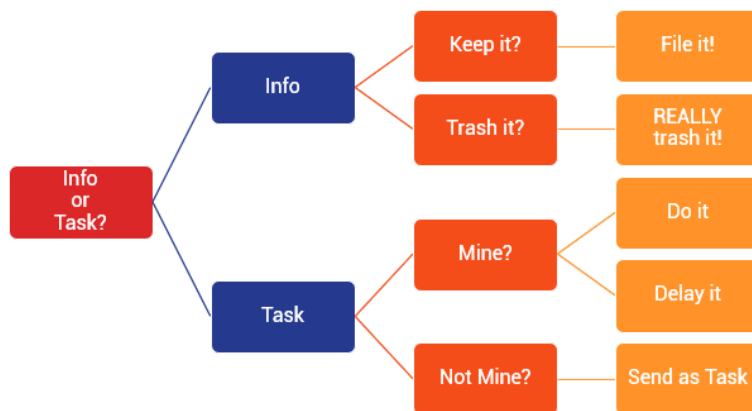
Let this decision tree help with the numerous items that cross your desk each day. It works for paper, in-person, and electronic items.

Process items in batches and touch things only once, deciding whether to handle each item now, delegate it, or delay it. Put items on your calendar as appointments, create tasks, or flag items for follow up. The idea is that things are scheduled and in your queue of tasks.

Stay on track and don't get derailed into reactive mode.

TECHNOLOGY RESOURCES

Task and Workflow Management

Getting a handle on your task and workflow management is a good place to start and gain peace of mind. Technology tools are a big help!

- **Task Management**

  - Outlook Tasks
  - Todoist
  - Microsoft To-Do

- **Workflow Management**

  - Microsoft Planner
  - Trello
  - Asana
  - LeanKit

- **Kanban Board**

  - Agile Attorney, John Grant
  - Agile Attorney Slack Group

Information Management

With the amount of information crossing our desks each day, having a robust tool to manage it is a must.

- **Microsoft OneNote**
- **Evernote**

Scheduling Appointments

Reduce the number of interruptions in your day by providing a convenient way for others to book time with you.

- **Outlook Email Calendar button**
- **Microsoft Bookings**
- **Doodle**
- **FindTime Outlook Add-In**
- **Schedule Once**

- **Calendly**
- **Apptoto**

Project Management

Projects have lots of moving targets, so it is important to have tools to manage the diagrams, lists, and communications associated with them.

- **Diagramming**
  - Mind mapping
  - MindManager
  - Microsoft PowerPoint

- **Lists**
  - Microsoft Excel
  - Google Sheets

- **Communication Plan**
  - Email Drafts Folder
  - Microsoft OneNote
  - Evernote

Office Productivity Suite

- **Microsoft Office 365**

  - What is Office 365 for Business? Video
  - What is Office 365? Video
  - What's the difference between Office 365 and Office 2016?
  - Periodic Table of Office 365
  - Pricing and Plan Comparison

- **Google G Suite**

  - 4 Things You Should Know About Google's Rebranded G Suite
  - What's keeping enterprises from using G Suite?
  - At home with Google G Suite
  - Pricing and Plan Comparison