Time Matters
Delegation System Manual

Get more done with
a simplified delegation system
for LexisNexis Time Matters

Time Matters Delegation Introduction

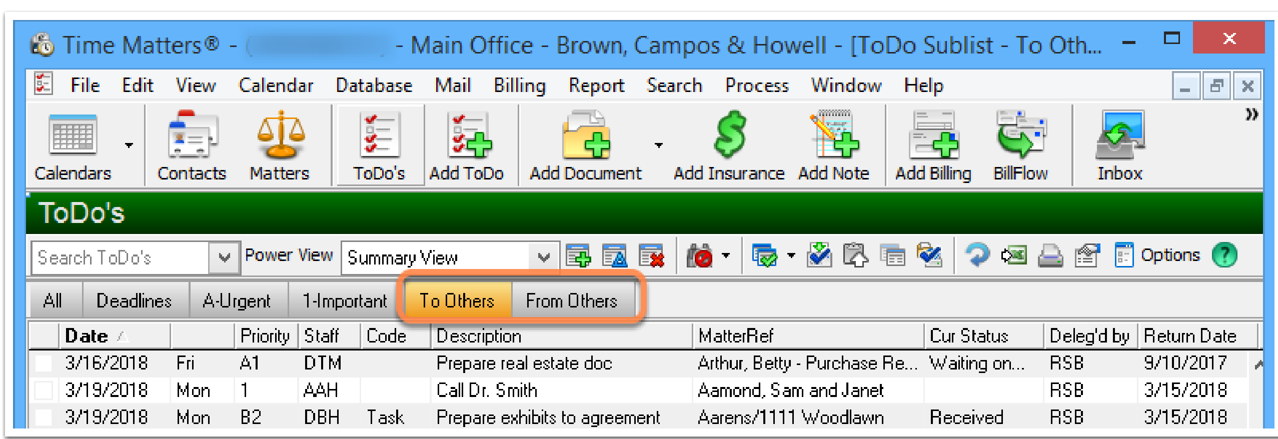
"There is no limit on how much you can do -- if others do it for you."
Anderson's Adage

Do you want to get more done? You can by delegating work to others. But here is the catch: you succeed only by effectively managing the work you delegate. To do so, you need a tracking system that works.

The key to the system is our customization of your Time Matters ToDo List. To implement the Time Matters Delegation System, call me at 800.575.0007 or write to: info@activepractice.com I will customize the Time Matters ToDo List for you and the others in your office.

With this system, you can quickly see the status of ToDo's you have assigned to others and of those that others have given to you. Just click on either tab on the ToDo list. These two tabs track work for everyone: those who delegate and those who do the delegated work. You enter a minimal amount of information. The two tabs keep things simple and workable.

The Two Tabs that Track Your Work: **To Others** and **From Others**:

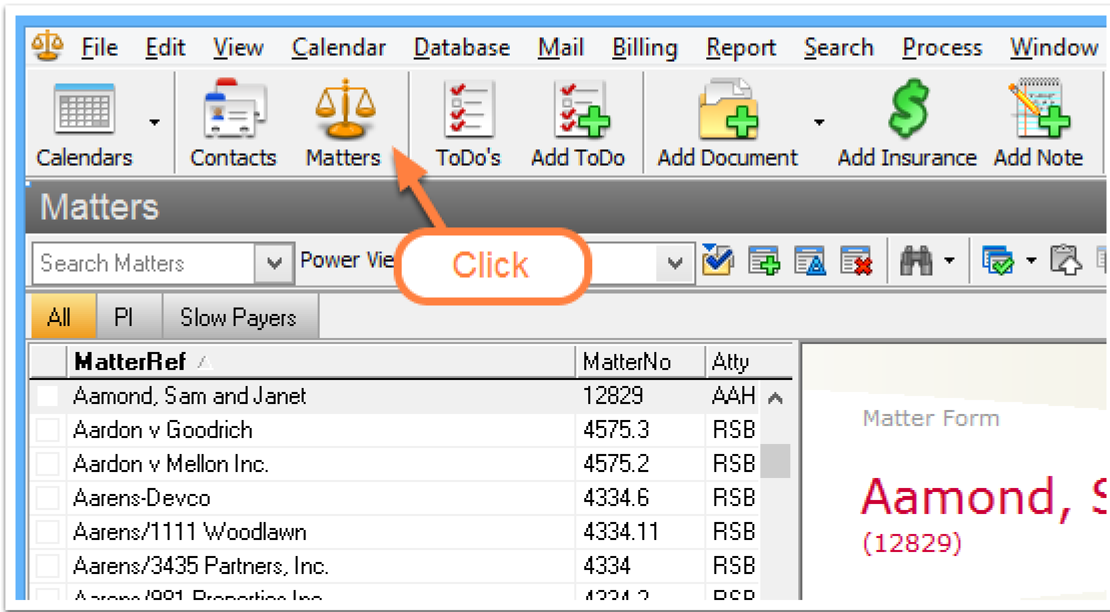


Delegating a Time Matters ToDo

1. Adding a Delegated Time Matters ToDo

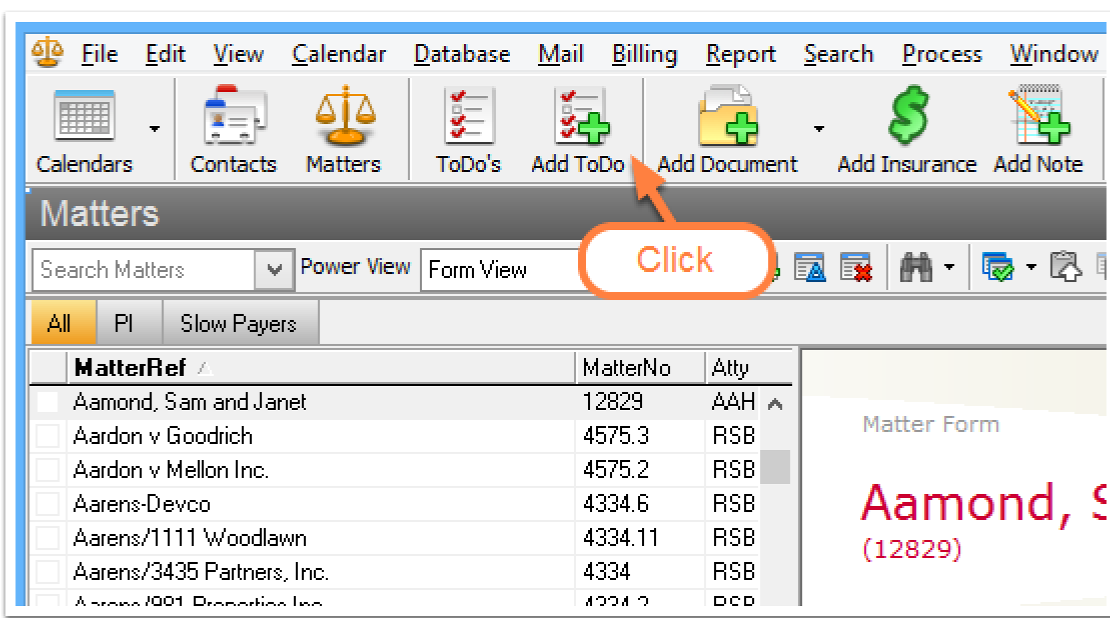
To add a ToDo and delegate it to another person:

1. Go to the Matter list.



2. To add a ToDo "on top of" a Matter, highlight a Matter in the Matter list.

   Click the Add ToDo icon or select: Main Menu | File | New Record | ToDo. (Hotkey: Ctrl-Shift-T to add a ToDo)



3. Fill in:

   1. Date -- The Due Date, the date by which the ToDo must be done.

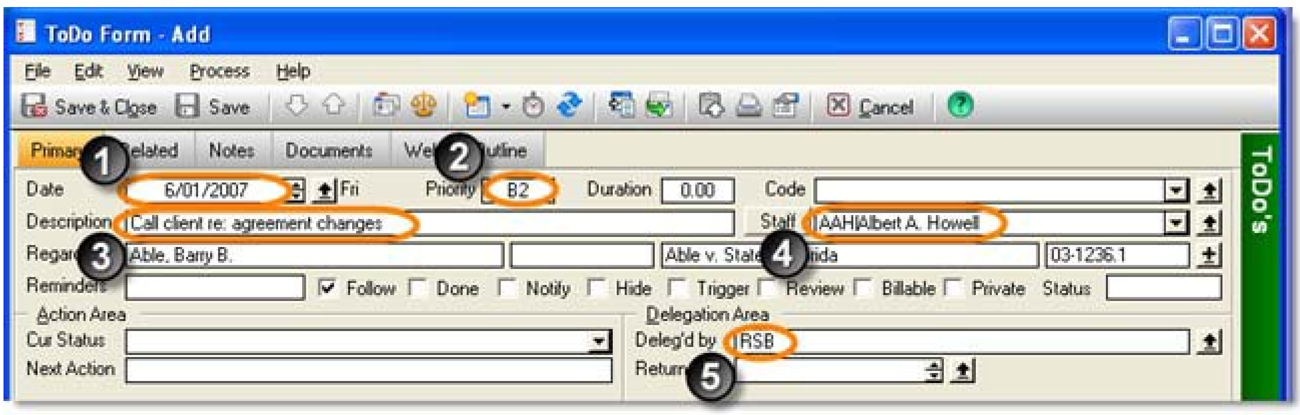
   2. Priority -- A1, A2, B1, B2, or B3

      Use a variation on Stephen Covey's Urgent/Important approach: A = Urgent, B = Not Urgent and 1 = Extremely Important, 2 = Important, 3 = Back Burner

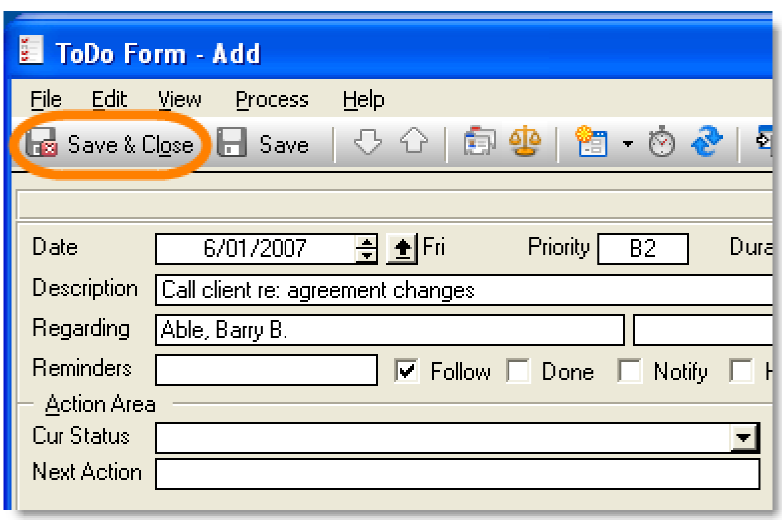
   3. Description -- Briefly describe the task.

   4. Staff -- The initials of the person the work is Delegated To.

   5. Deleg'd by -- Your initials as Delegator.



4. Press the Save and Close button



That is it! You have delegated a To Do. It will appear on your To Others tab. It will also appear on the from Others tab of the person delegated to do the task.

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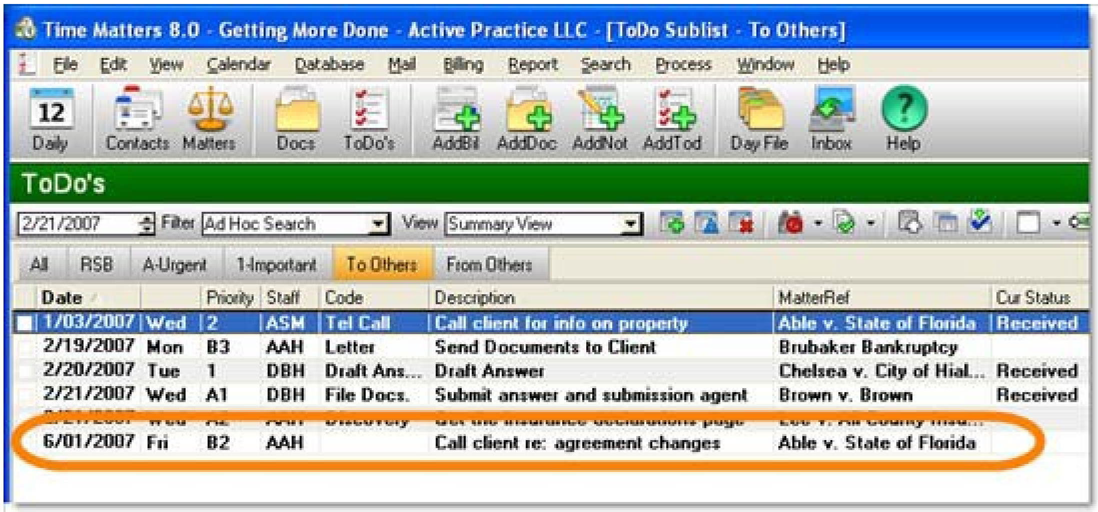


2. Returning a Time Matters ToDo to the Delegator

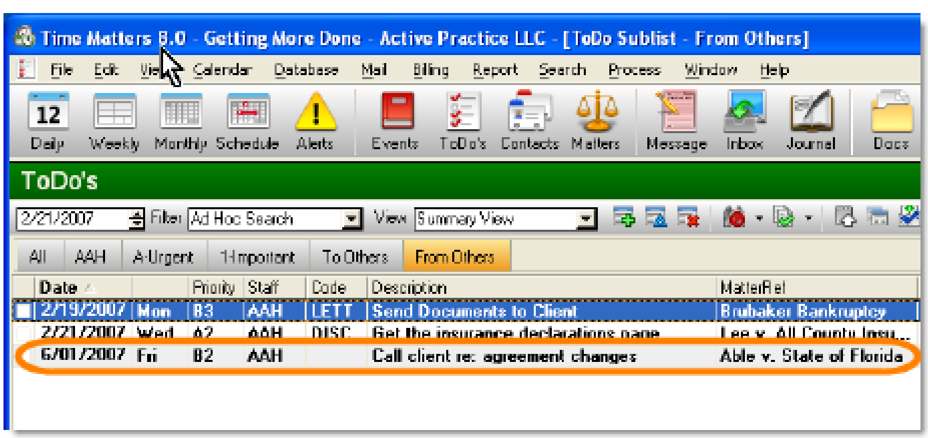
When co-workers finish To Do's you have delegated to them, they may or may not need to get back to you. Often they can simply mark a ToDo "Done." But sometimes you need to see their work and perhaps perform another step before the ToDo is done. If that is the case, you put a Return Date on the ToDo as explained below.

If you do not set a Return Date, it means that the person assigned to do the work just marks it done when it is done. They do not need to tell you the ToDo is done because you can see that in the system if you want to. The ToDo remains in the system linked to a Matter, but it disappears from your To Others tab. You can focus on what needs to be done. If you want to, you can view all ToDo's on any Matter, both done and not done, by going to the Matter record.

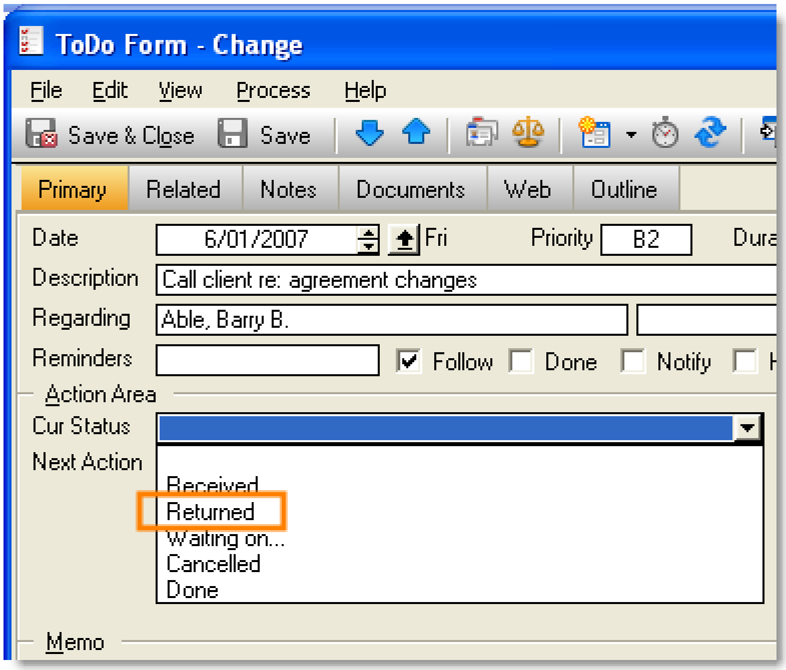
When people finish the requested work on ToDo's that have Return Dates, they change the Current Status of the ToDo's to "Returned." That change puts the ToDo's on the delegator's From Others tab. The delegator can review the work and then mark the ToDo's Done.

To return a ToDo to the delegator:

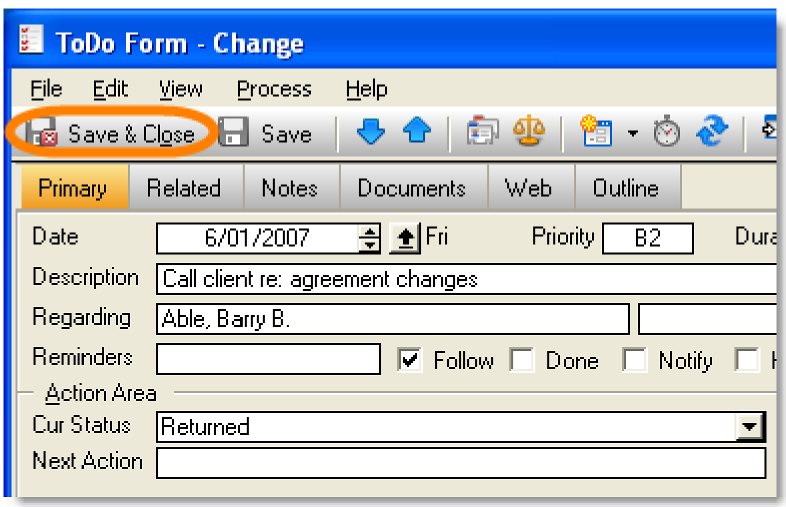
1. Go to the From Others tab and open the ToDo record.



2. In the Cur Status field, select Returned.



3. Press Save & Close



After a ToDo is saved, it moves off the Delegatee's From Others tab and onto the Delegator's From Others tab. The Delegator now has the ToDo on the From Others t ab. The last step in the handling of the ToDo is for the Delegator to mark it Done.

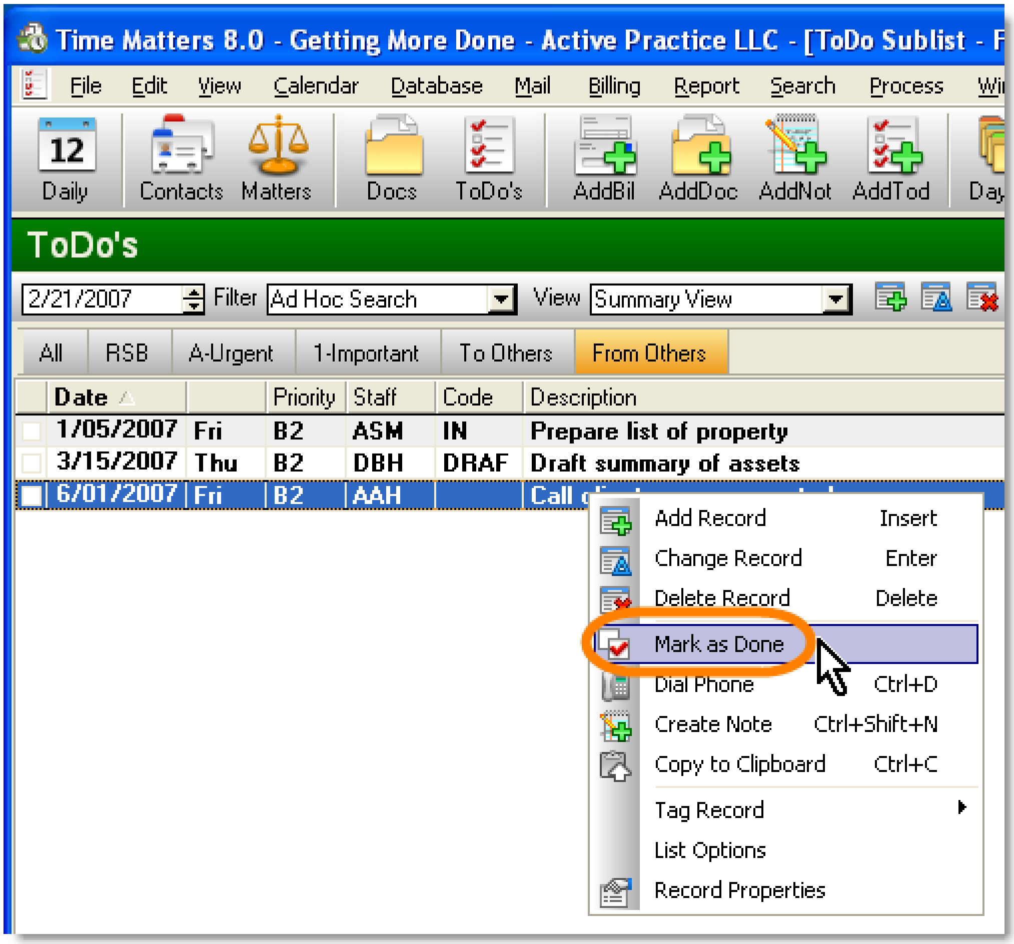
3. Marking a Time Matters ToDo "Done"

This system helps you track your work efficiently. When you use the system, one of your rewards is the satisfaction that comes from marking things "Done."

Here is the fastest way to mark a ToDo "Done":

1. Find the ToDo in the ToDo list.

2. Right-click on the ToDo and select: Mark Done



Another way to mark a ToDo record "Done" is to open the record and check the Done checkbox.

Filling in Details for a Time Matters ToDo

Here we go behind the basics of delegating a To Do. For your system to work well, you need to enter the right information. It is best not to write too much and important to focus what you write. Much of what you learn here applies equally well to ToDo's that you do not delegate.

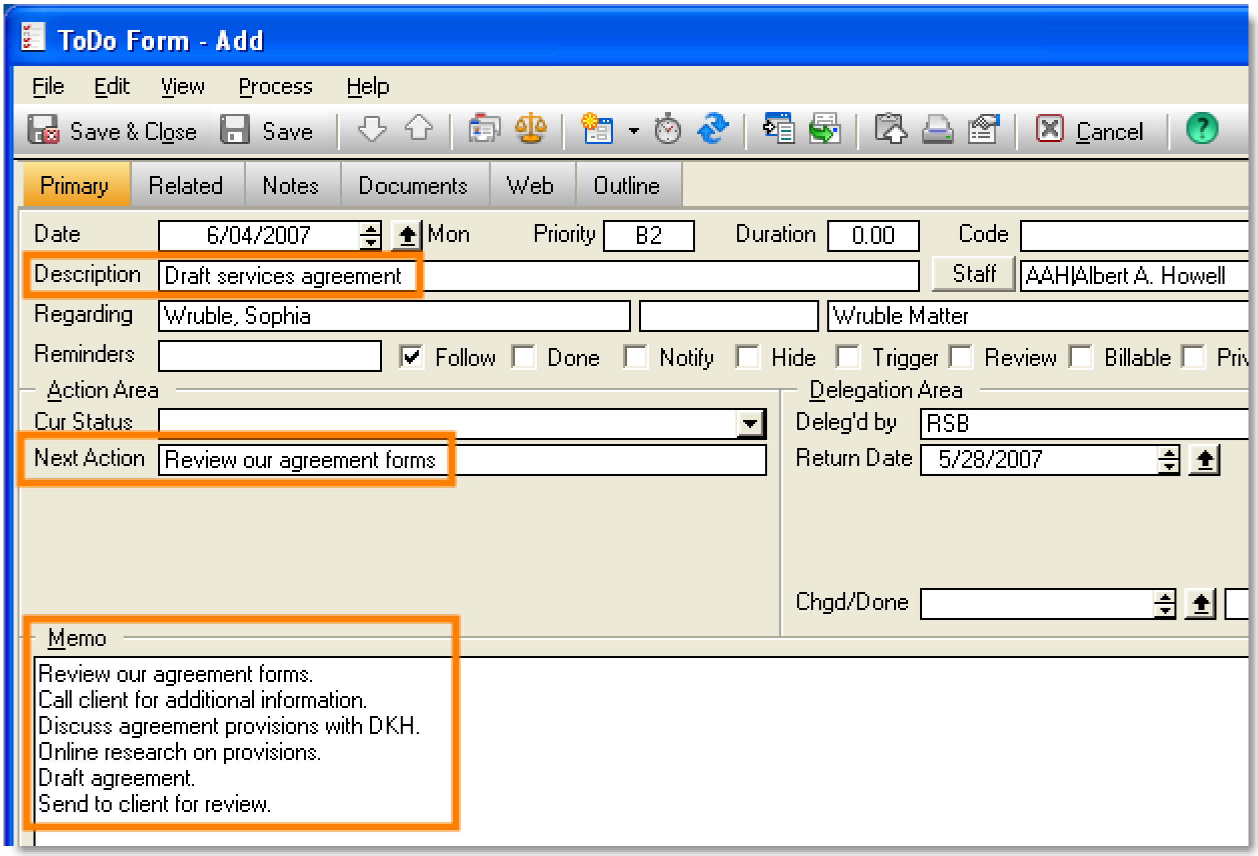
1. Writing the Description, Next Action and Memo

Write short Descriptions that jog your memory about the nature of each To Do. Guard against breaking your work down into too many separate, detailed ToDo's. That approach can overwhelm you. If a task has several steps, consider grouping them together in one ToDo. The Description will not cover all the steps. It just needs to cue you about the nature of the ToDo. For example:

Description: Call client re: agreement changes

The Next Action field can overcome your natural inertia or aversion to starting work on a To Do. Use it for ToDo's that are general in nature or have several steps. Write down the first concrete action you need to take to start working on the ToDo.

Use the Memo field to jot down important details and action steps for larger ToDo's.



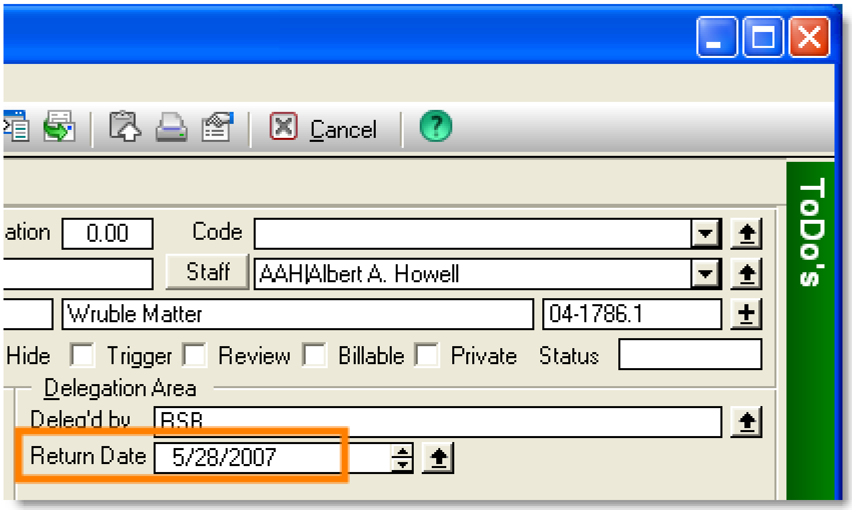
If a ToDo is straight-forward and clear, do not fill in the Next Action field. The Description is enough. For example: Call client about agreement changes. That is all you need.

For larger tasks, be sure to fill in the Next Action. Use the Memo field to list other action steps.

For example, if you need to draft a non-standard Services Agreement, you may need to collect some additional information and consider several different services agreement variations. But off the top of your head, you may not know all the items of information you may need until you have reviewed several forms of agreement. So you list the steps to complete the ToDo in the order that makes the most sense. Put the first one in the Next Action field to help you focus on where to start when you return to work on this task.

2. When to Set a Return Date on a Time Matters ToDo

The Return Date is optional. The delegator sets a Return Date when he or she needs to have the requested work back. The Return Date is set earlier than the Due Date (the Date field on a ToDo). The Due Date is when all the work on a ToDo needs to be done.



For example, a delegator may create a ToDo for preparation of three documents. A Return Date is entered for a couple of days before the documents need to go out to the client. That lead time allows the delegator to make sure the documents are ready ahead of time and allow time for the delegator to review the work and make any needed changes.

Making the Time Matters Delegation System Work

Following Up on Delegated Time Matters ToDo's

The system will work properly only if you follow up on your ToDo's. The tabs make your review process quick and efficient.

Whether you do your reviews several times per day, daily or weekly depends on the nature of the work. It is best to schedule these reviews just like other important appointments. If you fall behind in checking and updating your ToDo's, you may lose confidence in the system and fall back into inefficient ways of dealing with the things you need to get done.

In addition to scheduling a regular time when you will review the ToDo's, you should also set times to meet with the people you work with to go over the lists. In some offices, the assistant prints out listings of ToDo's and brings them to meetings. The assistant checks his or her To Others list and follows up with the delegator on ToDo's that have been returned for the delegator's attention. The assistant and the delegator discuss any problems that may have come up with tasks on the lists and any new ToDo's that may need to be added.

Installing the Time Matters Delegation System

Because each Time Matters database is different, I will customize your Time Matters ToDo List for you. One set of customizations applies at the Program Level to all of your users. When I am done, you will have the key to the system: Tabs for **To Others** and **From Others**.

With your new Time Matters Delegation System, you will:

- Get more work done by delegating it to others.
- Follow up effectively on work you have assigned.
- Avoid letting important tasks fall through the cracks.
- Have a system to literally keep tabs on key work for your clients.

Call or write to me to get started!

By Wells H. Anderson

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