

Tips for Using Project-Specific Word To-Do Lists Within the Outlook Task Function

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Introduction

During most of my time management seminars, I demonstrate various ways to use the Task function in Microsoft Outlook to manage to-do lists. (See “Tips for Using Outlook for Your To Do Lists,” which is also available for download at www.TimeManagementForLawyers.com). This paper describes how (and why) to use project-specific to-do lists in Microsoft Word in addition to – and in conjunction with – the Outlook Task function.

The Basic System

- For every significant case, matter, or project, create a new Word document specifically to serve as the to-do list for that case, matter, or project, and save it in the electronic file for that case, matter, or project. A case, matter, or project (and from this point on I’ll say simply “project”) might be considered significant for this purpose if it involves, say, on the order of at least ten or twelve individual tasks.
 - Tip: I like to name this project-specific Word to-do list according to a standard format such as:
 - .To Do (ClientName-MatterName), which becomes:
 - .To Do (Jones-Negotiation XYZ parcel)
 - Tip: Beginning the document name with a punctuation mark such as a period (or the @ sign if the period is difficult to see) means that the document will appear at the top of the document list within the electronic folder, since the automatic alphanumeric sort system on Windows computers sorts first by punctuation, then by numbers, and then by letters.
- Brainstorm all the possible tasks that may need to be done in connection with the project. [Just putting them on your list doesn’t mean you commit to doing (or delegating) the task, it’s just a way of keeping the task in mind so that you can decide whether the task should eventually be done at some point.] This project-specific Word to-do list is also a logical, convenient place to jot down reminders, notes, and ideas that you want to keep in mind in connection with this project.
- Create an Outlook Task that will serve as one of your primary gateways to your project-specific Word to-do list. The task description for this Outlook Task should encompass the entire project, e.g.: “Smith v. Jones Settlement Negotiations” or “XYZ Corp. Acquisition.” This Outlook Task should remain in your Outlook throughout the duration of the project. In the notes field for that Task (accessible when you double-click on the Task), insert a hyperlink to the project-specific Word to-do list. To do this:

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- (1) click anywhere within the notes field of the Outlook Task;
- (2) select Insert / File;
- (3) navigate to and highlight [single-click only] the document name of the project-specific Word to-do list;
- (4) click on the arrow to the right of the Insert button which is at the bottom right of the “Insert File” window”; and
- (5) select “Insert as Shortcut” (in later versions of Outlook, the option is named “Insert as Hyperlink”).

Your project-specific Word to-do list is now incorporated within your Outlook Tasks, and is only a few clicks away for ease of frequent review and revision.

- Tip: Choose one day a week (say, Friday) to serve as the day on which you will have your Weekly Planning Session, and assign that upcoming Friday as the due date for this Outlook Task. (This just means that this Outlook Task will appear in your “Tasks for Today” view on that day,¹ which will remind you to review the project-specific Word to-do list.) Once you’ve reviewed the project-specific Word to-do list, reassign the due date for the following Friday.
- Review all of your project-specific Word to-do lists at least once a week (optimally during your Weekly Planning Session). The week before it is time to actually do one or more of the tasks in a particular project-specific Word to-do list, just copy (don’t cut) the text describing that task from the project-specific Word to-do list, create a new Outlook Task, and paste the text describing that task into the subject line of the new Outlook Task. Your project-specific Word to-do list should remain unchanged. The reason you want to create a new Outlook Task for the one particular task is so that the task will be visible on your Outlook Task list for the particular day on which you want to do the task, rather than buried several layers down on the project-specific Word to-do list.
 - Tip: I like to include a prefix in the Outlook Task’s subject line to indicate the project to which the task belongs, e.g.:

Smith v. Jones: Contact Fred Jones re negotiation strategy
 - Tip: You might also want to insert a link between this Outlook Task and the Outlook Contact entry for Fred Jones. To do this, click on the “Contacts” button that’s at the bottom left of the Outlook Task. Scroll to Fred’s entry (or just click anywhere within the list of contacts and start typing his last name), then double-click on his name. His underlined name in the field next to the Contacts button is now a hyperlink to his Outlook Contact entry.

¹ See “Tips for Using Outlook for Your To Do Lists” for a detailed description of how to set up different Views (such as a “Tasks for Today” view) within your Outlook Tasks.

- Tip: You might also want to link this Outlook Task to the Word document containing your notes about your ideas regarding the negotiation strategy. Do this in the same way you inserted a hyperlink to the project-specific Word to-do list, as described above.
- When a task has been completed, indicate this in two ways: (1) delete the task-specific Outlook Task (but do not delete the general project Outlook Task, which should remain unchanged throughout the course of the project); and (2) in some manner, indicate on your project-specific Word to-do list that the task has been completed. For example:

Smith v. Jones: Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07

I like to use colors and other font variations in order to further differentiate between completed tasks and tasks that are not yet done. For example:

Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07
 Contact Sue Brooks re status of research – INSERT
 Decide whether to travel to CA for negotiation or to use telecon – INSERT

(“Insert” here is simply a placeholder on which to double-click for ease of inserting text such as “DONE on Fri 1/19/07”.)

Here’s another variation using Format / Font / Strikethrough:

~~Contact Fred Jones re negotiation strategy~~ – DONE on Fri 1/19/07
 Contact Sue Brooks re status of research – INSERT
 Decide whether to travel to CA for negotiation or to use telecon – INSERT

And another:

Contact Fred Jones re negotiation strategy – DONE on Fri 1/19/07
 Contact Sue Brooks re status of research – INSERT
 Decide whether to travel to CA for negotiation or to use telecon – INSERT

The variations are endless; experiment to find the formats that work best for you.

A Few Extra Bells and Whistles

- If you want to make your project-specific Word to-do lists a treasure trove of valuable information, whenever a task is completed, you might want to note such information as: how long it took to complete the task; who did the task (if you delegated it to someone else); your thoughts about the delegatee’s work, and any other information that would otherwise be forgotten. Keep copies of your completed project-specific Word to-do lists together in an electronic folder for ease of future reference. Possessing the information in these completed to-do lists – and having this information readily available – are the primary benefits of using project-specific Word to-do lists in conjunction with Outlook Tasks.

- Build up a stable of project-specific Word to-do list templates for standard projects, so instead of creating each project's to-do list from scratch, begin by (1) selecting the template that is most applicable to the new project, (2) saving that template as a new document, and (3) customizing that pre-existing to-do list contained in that template. (Tip: It's much simpler to keep these templates just as regular Word documents, rather than as "templates" as Microsoft Word uses that term.)
- Use ActiveWords (see "Windows Quick Keys & Other Keyboard Timesavers" available at www.TimeManagementForLawyers.com) so that you don't have to type out the date each time you insert, say, "DONE on Fri 1/19/07." Actually, I find it helpful to create two special ActiveWords each day when I'm updating my to-do lists: <do> to my mind stands for "done on" and I use that code as an ActiveWord for the entire phrase, "Done on Fri 1/19/07." I also use <db> as an ActiveWord; it stands for "done by" and I use that code as an ActiveWord for the entire phrase, "Done by Fri 1/19/07." (I like to indicate at least roughly when a task has been done, and sometimes I don't get around to updating my to-do lists until my Weekly Planning Session, and all I recall then is that the item has been completed at some point within the past week since my last Weekly Planning Session.)
- Use ActiveWords as another gateway to access your project-specific Word to-do lists. I like to assign the abbreviation <tdl> (for "to do lists") as an ActiveWord to open each and every one of my project-specific Word to-do lists. (Yes, you can assign the same ActiveWord to open multiple documents.) Typing <tdl> then pressing the F8 key (which activates ActiveWords) will then reveal a list of all of your project-specific Word to-do lists; just click on the one you want in order to open it. In this way, you can quickly access any one of your project-specific Word to-do lists without having to navigate to the project's electronic file, or using the Outlook Task hyperlink.