

D-A-F-T

Your Way to **ORGANIZED!**



A deceptively simple system
for getting things done.

Andrea Cannavina



LegalTypist, Inc.

Virtually@YourService![™]

This publication is designed to provide competent and reliable information regarding the subject matter covered herein. However, it is published with the understanding that the author is not engaged in rendering legal, financial or IT consulting services. The author specifically disclaims any liability that is incurred from the use or application of the contents of this book. The author used their best efforts in preparing this book. The author makes no representations or warranties with respect to the accuracy, applicability, fitness or completeness of the information contained herein.

This book contains material protected under international and Federal Copyright Laws and Treaties. Any unauthorized report or use of this book is prohibited. All rights reserved. No part of this book may be reproduced, transmitted or published in any form or by any means, electronic or otherwise, without express written permission of LegalTypist, Inc.

Long Island, New York USA
© 2007-14 LegalTypist, Inc.
All rights reserved.

I started using your D-A-F-T system and my life is already so much easier.

...your "D-A-F-T process" for email management ... is excellent and is certainly applicable to any company.

I loved your article on D-A-F-T. It's the first time I've read an article on organization that made sense and is something almost anyone can do.

Thanks for your D-A-F-T system. My Yahoo inbox is empty for the first time in years!

Using the D-A-F-T system is so simple and quick it has helped me to organize my email strategically in order to be more efficient and effective. I no longer dread my inbox.

Seriously worth a read - she knows from whence she speaks!

Ross Kodner, President and founder of MicroLaw, Inc., a 20+ year old Milwaukee, Wisconsin-based legal technology consultancy and turnkey legal automation system provider. Sadly, we lost Ross in 2013; but his contributions and knowledge live on at the site now managed by his wife, Renee, also a long-standing legal technology consultant worth contacting: www.microlaw.com

Are You On Overload Yet?

We are all bombarded with so much information . in our mail, on the phone, through the computer and texting to our phones.

Rather than making our lives easier and less stressful, technology appears to be making the battle of information overload that much harder to win.



Buzzes, flashes, dings and rings ÷ the digital never stops!

Pile on the paper that crosses through your world every day and no wonder most people feel completely overwhelmed.

I should know ÷ I've been running and growing a business working with law firms for 13 years. In those years, I've had and/or raised two children, completed the restoration of our 1924 Colonial located on Long Island, New York, along with taking my one-woman show and making my company a nationally recognized brand helping firms of 1-100+ get the day to day secretarial and administrative work done.

In other words, I've been dealing with email (and lots of it) for over a decade.

What I quickly learned was that I needed to have systems in place to keep my business information organized and accessible . and so started my path to what I call *intentional organization*



I began reading and consuming all I could on the topic of organization . and absorbed what I could from the likes of David Allen of Getting Things Done and Barbara Hemphill of The Paper Tiger. I've even gone so far as to purchase specific software and paid hard earned dollars to attend special classes and lectures on the topic.

Seemed like everyone would spend a great deal of time telling me why I needed to be organized (which I already knew) but not enough time explaining how to get organized.

That's not to say I didn't learn a few pearls of wisdom in my journey be able to more easily stay on top of all the information that comes into my word each day.

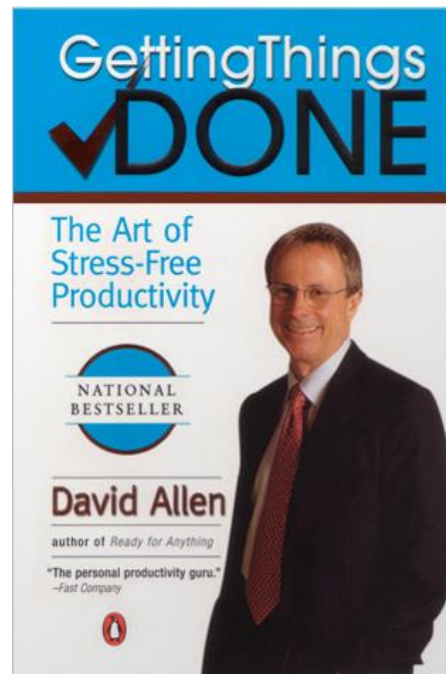
I bring this up because my final realization was that intentional organization is an individual journey and the systems, paper and tech that are lashed together to work for each person. You will learn a bit from me, a bit from someone else and at some point you are going to morph it into the personal system that you use.

For instance, one item that stuck with me was the acronym **F – A – T**. It stands for File, Act, Toss.

I first read about it in David Allen's **Getting Things Done** - a great book for those who are organizationally challenged. Reading this book, you learn of some of the emotional roadblocks to getting and staying organized.

Those are NOT the types of issues I cover in this book.

The purpose of this book is to give you the how+to get organized . an easy to remember, consistent process you can use to stay on top of all the information . digital and paper . encountered in our crazy mish-mosh of business/life.



I did learn a LOT from reading **Getting Things Done**, so I highly recommend you pick up a copy and read it too. It's what got me organized. It didn't keep me organized . which I'd get to in a little bit, but it sure did get me thinking and getting to some realizations.

Getting Things Done made me realize that:



I had to write stuff down. No matter how good my brain is at keeping information handy . I still needed to get it out of my head in order for it to (i) clear up my grey matter for more important stuff; and (ii) be in a form to be acted upon (by me or someone else).



I had to write the stuff down in one place. I used to use a blotter but that solution certainly is not portable. So I got a notebook. First I tried to kill two birds and have a calendar with space to write down stuff on each day. But, just as I found one that I liked - it got discontinued. I now use the simple Mead 5 Star 2 subject notebook. Available anywhere for under \$5.00. Each day I flip to a new page, date it and anything I need to jot down, I do. Anything jotted that is important is then transferred to wherever it needs to go (Outlook contact; add to new client process, etc.) I then put a big check mark through it in my notebook. If I didn't have a notebook, I wouldn't have a place to start the capture process; nor an instant follow up system in place with no extra effort.



I had to get organized. Until I took the time to do so, I was going to be like a hamster on a treadmill . endlessly running from one emergency to another - all because things were slipping through the cracks because I wasn't organized.

What I didn't like about **Getting Things Done** were the lists and to be completely candid, at first, I loved the lists.



Ultimately, I think lists give one a sense of control.

Where the lists failed for me was in the amount of time/focus I spent keeping them all up to date and synced across all my equipment/devices. While Office365 and today's technology have removed much of the technological issues with syncing (remember DAFT was first published in 2007 and I've been working on line+since 2001); now DAFT helps with maintaining focus and using small amounts of time to manage the information received via email vs. just having it accessible.

Back to **F A T** or File, Act, Toss:

Unfortunately, I learned that not everything that I came into contact with each day could be Filed, Acted upon or Tossed . so this process just didn't cut it for me.



That's how the **D-A-F-T™** project began . as a personal journey to figure out a way to keep me and my digital/paper information organized. I never intended for my system to work for anyone but me, so only considered myself and my needs (which was refreshing after consulting and configuring things around other people's needs all the time).

To start, I listed what I needed from a system. I knew it had to:

- ✓ be easy to remember/use;
- ✓ work for two of my biggest time drains . email and task organization;
- ✓ work as well for paper as it did on for digital; and, if possible,
- ✓ work with what I already owned and knew how to use.

I know. That was a pretty tall order. I didn't even know if it would even be possible. But those were my requirements.

I began to notice what things I handled most, and how I handled them and I kept coming back to F-A-T.



I knew **almost** everything I touched could be Filed, Acted Upon or Tossed but there was something missing because not EVERYTHING I touched could be.

So I kept ruminating and pondering the types of items that didn't fit, and then it dawned on me! What did all those items have in common? They needed a place to hang for a bit. That's what I was missing!

Sometimes you just need to let something set for a bit and with F-A-T, I had no place for these types of items.

I immediately thought of adding **R**uminate+ to the mix, but the first acronym that came to mind was FATR . and that did not bode well so I ditched it and the next word that came to mind was **D**efer+- and the rest, as they say, is history!

In **D-A-F-T™** the **F**+ stands for File, the **A**+ for Act and the **T**+ for Toss, but I've added the **D**+ for Defer and rearranged the letters making **D-A-F-T™** - Defer, Act, File, Toss.

A simple yet very comprehensive system that works to keep anything organized.

How can anyone use D-A-F-T™ to stay organized?

Honestly, it's really easy, once you get the hang of it.

Just like David Allen's
FAT . in D-A-F-Ti the
%F+stands for File, the
%A+for Act and the %T+
for Toss, but I've added
the %D+and rearranged
the letters making D-A-
F-Ti - Defer, Act, File,
Toss

D –Defer
A –Act
F –File
T - Toss

As with any other new way of doing things, D-A-F-T™ takes a little bit of time to put into place, but unlike complicated software and processes, once you learn the main principles of D-A-F-T™ it becomes very easy to apply and use.

First say it to yourself a few times: "D-A-F-Ti - defer, act, file, toss"; "D-A-F-Ti - defer, act, file, toss." Let it sink in.

Think about it a bit.

Why am I having you do this? Because I want it to start to become second nature that when you are presented with something new (document, email, request, etc.) - you immediately think "Do I need to Defer, Act, File or Toss?"

That's it. The secret is out! All you have to do is think . %dmmm ò do I need to do something right now, hold on to this for later, toss this or put it someplace for safe-keeping/future reference?+

If you can remember DAFT™- Defer, Act, File and Toss . honestly, you have all you need to get and stay organized.

Can't be that easy, I know that's what you're thinking. I thought so too. After using it for myself for a few years; and then sharing it with others, I know it helps.

Using D-A-F-T™ To Keep Your Email Under Control

Outlook Users:

Right click on Personal Folders in the left navigation (under %All Mail Folders+); select New Folder, name it, make sure %Post and Mail Items+ and the correct %Personal Folders+ is highlighted and click OK. Now move the folder to the %Favorite Folders+ again by dragging and dropping: Click on the folder, holding down the left mouse key and drag it to the upper window. Let go.

To begin, I'm going to explain how to use the D-A-F-T™ system to organize and stay on top of the hundreds, if not thousands, of emails you need to process each week. Once you understand how D-A-F-T™ is applied to keep your Inbox under control, it is easy to incorporate D-A-F-T™ as an organizational tool for off line processes too.

Defer . Act . File . Toss.

First, you need the proper folders. In your email application, I want you to create 4 folders: ..Defer; .Act; .File; .Toss.

Please note: I have intentionally placed two periods before the D in Defer and one period at the start of each name of the other three folders. This is so your email application will keep these folders at the top of your list and in the correct order.

These four folders . Defer, Act, File, Toss are all you need to get and stay on top of your emails and the electronic files and information that travel via email every day.

The reason is because to be truly organized (honestly, there is no other way around it) . the ONLY way to be organized is if you keep your Inbox empty.

All the time.

I know! Everyone says it . I get 100, 200, 500+ messages each day, how am I supposed to keep my inbox empty all the time?!

That is what D-A-F-T™ is for and it will make keeping your inbox empty easy . even a breeze ð



How To Apply D-A-F-T™



As you scan your Inbox, all you need do is determine which one of the 4 folders each message belongs . Defer, Act, File or Toss. You are not to do anything other than scan your Inbox and immediately sort each message into one of the 4 folders. Defer . Act . File or Toss.

Each message you look at should take you less than a few seconds to determine the proper location within the D-A-F-T™ folders . Defer, Act, File or Toss.

You can scan your Inbox as many times a day as you feel comfortable; but only to move the messages to one of the D-A-F-T™ folders.

You do not stop the D-A-F-T™ process to write a reply . you do not stop the D-A-F-T™ process to print something out. You move those types of messages to the .Act folder and keep sorting the rest of the messages until your Inbox until is empty.

IMPORTANT: When scanning your Inbox, the only thing you are to do is determine which of the four folders . Defer, Act, File or Toss - each message belongs. Only when your Inbox is empty do you stop sorting.

Once you get the hang of it, scanning your Inbox and sorting becomes second nature so you can easily maintain an empty Inbox.

Inbox Empty – Am I Done?

No! Each time you scan and empty your Inbox . you are not done with the D-A-F-T™ process.



Once your Inbox is empty, you immediately click on the .Act folder to review the messages you moved into that folder which require you to do something.

Look at each message in .Act and decide if the action you determined was necessary will require more or less than 2 minutes to complete.

If less than 2 minutes, take care of that item right then and there; then move that message out of .Act folder.

RECAP: Scan and empty your inbox then scan your Act folder and immediately take care of any item which will take less than 2 minutes to complete. Once you complete the action, move that message into the ..Defer, .File or .Toss folder, as appropriate.

Your Act folder now contains only messages that require action that takes longer than 2 minutes.

For these messages, you are going to take 2 minutes and consider what you need to do and when you have the time to do it. You will then add the appropriate amount of time you need to complete the action to your calendar.

Every message left in your Act folder will require you to take 2 minutes and complete or take 2 minutes to consider how much time the required action will take to complete and to add an entry to your Calendar to get that action done.

Outlook Users:

Drag and drop the email message into the Calendar tab to open a new appointment

Once the appropriate amount of time and a date to complete the action has been scheduled in your Calendar, you move the message to the ..Defer folder.

At this point in the D-A-F-Ti process, your Inbox and your .Act folders will be empty and anything urgent will have been taken care of. Items that need time to complete have been calendared and saved in a manner for easy reference.

If you want to stop the D-A-F-Ti process here and move on to something else besides email, you're good to go!

However, once you have gone through and emptied your Inbox and .Act folders, AND, if time permits, you can go and open the ..Defer folder.

D E F E R

The ..Defer folder will only have items in a holding pattern or non-urgent items which have a corresponding calendar entry to complete the item.

You can do a quick glance or sort to see if any of the items require your immediate attention, need to be scheduled into your Calendar or can be completed.

When completed, items in the ..Defer folder are moved to the File or Toss folder, as appropriate. Please note, ONLY items moved from the .Act folder to the ..Defer folder will have a corresponding Calendar entry.

When you initially scan your Inbox, you may also move a message directly into the ..Defer folder. Ezines you want to read later are a good example of a type of message for the ..Defer folder which won't have a corresponding Calendar entry.

Keep in mind, it is ok leave things in the ..Defer folder for an extended period; however, you should not accumulate messages where action is not at some point in the future necessary. This means if your ..Defer folder starts getting large, schedule time in your Calendar to go through and further organize with color or clean out (i.e., read the last three issues of The Legal Connection Ezine).



So we've covered Act and Defer, next in the D-A-F-Ti process is File which stands for .File.

F I L E

.File is where you put any emails that you want to keep. Receipts for on line purchases, confirming emails and the like.

You should try to keep the .File folder as small as possible.

A good trick is not to store anything which you can gain access to on line; and to use gmail or other non owned by you domain for receipt, organization and storage of ezines and other non-work pertinent correspondence.

Good examples of items you don't need to File are messages from groups and list serv discussions (such as those by the ABA's [Solosez](#)).

When it comes to filing, I'm not big on having a ton of folders in my email program. You could technically open a folder for each project, client, purchase or you name it. That just makes things more disorganized for me.

This is why I group my File email by date. At the start of each month, I create a folder for the last month (i.e., 2012-03). I then block/copy all messages in the File folder into that month's dated folder. I also block/copy any emails in my Sent folder for that month into the dated folder.

I now have a record of everything I wanted to keep that came in, and anything I sent out, in one spot, organized by date. For back up, I .pdf the entire contents of each dated folder to store with my other backed up business records and documents outside of my email program.

Finally is .Toss. Consider .Toss as you would the recycle bin and use it the same way. Judicially toss any emails from anyone you don't know or which contain odd lettering or fishy looking attachments.

T O S S



Recap:

Using the D-A-F-Ti process you scan and move all messages from your Inbox to the corresponding Defer, Act, File or Toss folder.

½ Inbox empty.

You then Act on any emails in the .Act folder that take less than 2 minutes and move the message to .File/.Toss; or schedule time in your Calendar in the next day or so to complete the action and move the message to the ..Defer folder.

½ Act folder empty.

As your schedule permits, but at least twice a day, scan through the ..Defer folder for items you have the time to complete or work on. The goal being that nothing stays in the ..Defer folder indefinitely.

½ Defer folder managed.

The .File folder is for anything digital you wish to keep a record of.

½ Filing complete.

ō and you've tossed anything that needs junking into the .Toss or Junk folder.

½ Housekeeping/admin/maintenance done.

How the D-A-F-Ti process really comes together is at the end of the day and with general housekeeping. At the end of each day, about 10 minutes before I wrap up, I scan my Inbox and Act folders to make sure everything is moved accordingly. I then scan my Calendar and navigate to the Defer folder to mull over/ruminate on anything I need to think about or deal with in the morning. Finally, I delete everything in the Toss folder . making my Inbox, Act and Toss folders empty for the next day's barrage of incoming!

One of the best things about the D-A-F-Ti System is that it is a process that transcends the digital world and works just as well for paper.

Using D-A-F-T™ To Keep Your Desk Under Control



To use D-A-F-Ti with paper you need three folders, stacking bins or other holding spots, labeling as above - Defer, Act and File (you can simply toss papers into the old circular file!)

The Defer file can be further broken down with weekly/daily dividers. Also, depending on your volume of paper . your File folder may need to have reinforced sides.

Just as with emails, you don't want to allow the paper in the Defer and File folders to become out of control. These folders exist to keep the information organized, at hand and moving -- not to serve as a permanent spot for anything.

Follow the sorting of paper documents as above for emails . placing each item in the appropriate Act, Defer and File folders. Clear out the Act folder by adding items to your Calendar and moving to the Defer folder; or completing the task and moving to the File (or Toss) folder. Routinely go through the Defer folder to keep everything moving.

At least once per week, take the papers out of the File folder and scan to .pdf to attach to the appropriate client/project file on your hard drive and/or file in the physical client/project folder.

That's it! You're done . emails and other electronic information, paper documents and even your calendar all organized with one simple system . one word really.

No special software, no special training. Just the D-A-F-Ti principles put you in control of the emails, information, files and documents that cross your desk each day.

D-A-F-Ti - Defer -Act -File -Tossi your way to organizational success!



About The Author:



Andrea Cannavina has dedicated her career to helping anyone in the business of law better understand, integrate and use technology to increase efficiency and productivity, in order to reduce costs and the overly stressful environment of a law office.

Her professional credits include:

- “ Master Virtual Assistant and CEO of New York-based **LegalTypist, Inc.**, a legal administrative, secretarial and transcription service;
- “ Creator of the DAFTi organizational system;
- “ Publisher of The Legal Connection Newsletter /Founder of The Legal Connection Community Site; and
- “ Avid recommender of ToastMasters and Solosez

Andrea is a recognized expert in upgrading tape-based dictation to digital processes; teaching how to delegate for greater efficiency; and working technology and the web securely. Andrea is also passionate about preventing attorneys from needlessly investing in suspect %SEO+ and %cloud+ based services, as well as helping everyone understand how to create and maintain an effective and professional web presence.

Past talks by Andrea include:

- “ Outsourcing common business functions for Chicago Bar Association (2014)
- “ Communications and SaaS technologies for the American Bar Association (2013)
- “ Development of websites/blogs for San Francisco Bar Association (2013)

She is also a frequent contributor to popular legal technology magazines, newsletters, websites and blogs.

Andrea is a long-standing Associate Member of the American Bar Association . Law Practice Management Division and GP/Solo Committee. As a non-lawyer, she was honored to be asked to serve on the eLawyering Task Force (2012).

To speak with Andrea about putting systems in place for your practice, or to learn what she knows about pretty much any tech marketed to %legal+. click on the following link and pick a convenient time for a call: <http://www.legaltypist.com/call-me/>