Task, Project, and Law Department Management

Career Development

Law departments are very busy places: Lawyers, compliance, and other paraprofessionals typically have plates overflowing with work. Clients are demanding, and law department staff members must manage all demands without dropping any of the plates they are juggling.

Anyone with experience has adopted systems to manage those plates. Some people keep paper lists or sets of notes specifying the work they are doing. Some use email as a kind of task list, with different folders, flags, and hierarchies. Some have intricate document folder systems. Some even use their calendars to keep track. And many people use a hodgepodge of some or all of these.

These systems aren't bad (if they are used systematically and consistently), but they typically aren't the best tools for the job. The best tools are purpose-built to handle tasks and projects and combine the best features of those lists, notes, email, folders, and calendars. Best of all, they enable law department members to collaborate effectively on their tasks and projects. I will address some of those tools below.

Let's start with the differences between task and project management tools. Many of you have probably been involved in projects in which formal project management techniques have been applied. You may have participated in tortuous discussions about bewilderingly complex projects captured in Microsoft Project or Excel. If so, you know that project management tools are designed to capture and relate many different parallels as well as serial workflows involving many different disciplines and participants over a specified, segmented timeline.

Accomplishing major projects would be impossible without this discipline. Whether it is a merger and acquisition or a major construction or IT implementation project, your company needs to employ rigorous project management (PMO) techniques and tools to make sure that everything required for success is completed systematically by all participants.

Task management is on the other end of that spectrum. Lawyers in the department need some system to individually manage their tasks, and, as I said before, many people successfully use several different tools that weren't built to address that need. Using a purpose-built tool becomes more important in the broad spectrum between tasks managed by a single individual and complex projects that include a myriad of tasks, deadlines, work streams, and individuals.

More and more, law departments find themselves living in that space. Several lawyers may be working on one regulatory filing or performing due diligence or other document reviews. Lawyers and compliance professionals may need to work together on an information incident or consumer complaint. Timeframes can be tight, and there may not be time to meet in person every time new tasks need to be assigned or considered. Emails can become lost in the shuffle and often require the extra step of exporting a work request into the individual's task management tool of choice.

We also know that more of our work is becoming collaborative. Evidence is everywhere, from the popularity of tools like Slack and Microsoft Teams to the way collaboration has become integral in everything from Microsoft Office to Apple's iWork suite to Google Docs. Easy collaboration has become the hallmark of technology tools of this century.

When you combine the inevitable trend toward collaboration with the fact that our work is becoming increasingly complex and project-like, it makes sense to consider using task management tools that not only facilitate collaboration but also link tasks to work streams to enable you to effectively engage in more complex projects. I'm going to recommend two such tools in this column.

First, for those deeply invested in the Microsoft Office ecosystem, the Planner app within Teams is a terrific task manager. It's borrowed one of the more popular paradigms from apps like Trello, creating task "cards" that can be organized by "bucket" to create a simple project plan (see illustration on this page). Organizing individual tasks in this way enables you to see where a given task fits into a project and which tasks might be missing.

You can also easily assign tasks to one or more project team members, and of course it is fully integrated with all the other components of Office 365, so it is easy to Chat, schedule Calendar meetings, virtually collaborate in Word or Excel documents, etc.

I confess that for many years I felt trapped by being forced to work in a Microsoft ecosystem that I thought had aged poorly and become stagnant. But in the past five or six years, Microsoft has done a simply superb job of reinventing the Office Suite in a way that makes it one of my favorite work platforms.

Having said that, since I myself generally prefer working on Apple hardware, I would be remiss if I didn't also point out some of the tools that were designed specifically with that hardware in mind.

I have been using the Omni Group's Omnifocus task manager for at least a decade. It was designed by the same folks who make my outliner of choice, OmniOutliner, and was specifically created with David Allen's Getting Things Done (GTD) methodology in mind.

I have written about this before, but essentially the GTD methodology is to use one capture system for all your personal and business tasks. Allen believes (and I agree) that getting commitments out of your head and into a single reliable capture system (a trusted source) will not only make you more likely to meet your commitments, but also will relieve your mind of the stress of trying to remember all the things you need to do on your own.

Omnifocus is built for individuals. It accommodates projects and does an especially good job of handling dependencies within those projects, but it is not really built for teams.

For actual project work, the Omni Group's OmniPlan is much better. It is, in my opinion, far easier to learn and use than MS Project, but doesn't have as many features. However, it is a very good task management project plan tool that will allow you to assign tasks to multiple individuals, and capture the work breakdown structure and dependencies, etc.

Not surprisingly, Google also provides some great task and project management tools. Google Tasks is a simple but full-featured task management tool that can create tasks and sub-tasks.

You could then link those tasks into more complex project plans set up on Google Sheets. I don't have a G Suite subscription so I am not well-versed in Google Sheets, but from what I can see, it would be a useful tool for people who have adopted the G Suite platform to do their other work.

The Docket focus for this month is law department management, but so far, I have mostly written about individual task management and, to some extent, projects.

But if your law department adopted a unified approach to task management — that is, if everyone in the department decided to use Planner, for instance, and you trained everyone in its use so that usage would be consistent and systematic — it could become a great tool for managing the tasks of the department as a whole.

Your managers could make and track assignments in Planner; your teams could collaborate through Planner; and you could even interact with your clients through Planner. I don't have personal experience with this (because I have not worked in a law department that was willing to commit to it), but I can imagine Planner or a similar app acting as the backbone of a law department management system.

And please, if any of you do already have such a system in place, I would very much like to hear from you how it's working out.

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