

A man in a light blue striped shirt stands with his back to the camera, looking at a large whiteboard. The whiteboard is covered with numerous hand-drawn business icons and sketches, including a bar chart, a clock, a handshake, a speech bubble, a checkmark, an envelope, a magnifying glass, a target, gears, a calendar showing '28', a lightbulb, a group of people, a flowchart, a circular arrow with dollar signs, a checklist, a folder, a network diagram, a clipboard with a key, a graph with an upward arrow, a pie chart, and a document with a pencil. The man's hands are on his hips as he gazes at the board.

Note-taking - The most beneficial of skills

One of the snippets of advice given on this initiation day was the importance of taking notes. Within minutes of arriving, a brand new notepad was thrust into my hands. And, throughout the day, I spent every moment frantically logging down each piece of information. It is a skill and lesson that I have carried with me ever since. I even recall being praised by my then Head of Chambers years later, who hailed me for always having a notepad to hand, ready to make a note at any point.

During the years, the act of note-taking has continued to develop. One of the most iconic and one of my personal favourites has to be the Post It method. During the second half of the '80s, these brightly coloured self-adhesive notes made their debut, and pretty soon, there were few desks omitted from their eye-catching assault. It became commonplace to see clerk's desks plastered in yellow Post It notes. Every call they had received in the past 30 minutes found its own location and, while this method seemed to bring order, it tended instead to cause elevated stress.

The advancement of technology for legal note-taking

In recent years, the evolution of technology has moved the traditional notepad into a digital form. My personal paper scribbles have been transformed and I am now the proud owner of a Remarkable 2 Tablet - which I highly recommend if you are a serious note-taker. In the early years, I attempted to make notes on my smartphone but found it hard to differentiate between important presentation notes and clearing the final level of Candy Crush. And while we're on the subject of notes, it's important to recognise their significance within the legal space. You can jot down snippets and captions from thousands of presentations but if you don't have a structured method of processing these after, they become defunct. Essentially, you end up like that clerk - surrounded by a mirage of notes that seem to merge into one.

Trello - Paving the way for organised, structured, and useable information

During my time within the legal sphere, I have experimented with several tools in an attempt to manage my tasks, collaborations, and workflow. And of all of them, I have found Trello to be the most effective. Launched in 2011, this collaboration tool was created to help individuals and businesses organise projects into boards. From a single glance, you can see what is being worked on, by who and what activities are complete. As a 'light project management' tool, it is ideal for individual use. While perhaps not best suited to larger team collaborations or as a replacement for full project management tools, such as Basecamp, it still provides a host of features to benefit your note-taking.

The best thing about Trello is its simplicity. The backbone lies in the premise of boards, lists, and cards. Similar to those large-scale whiteboards you once used to host collaborative meetings, they have now been reimaged into a digital and practical way to track projects. Within these, your lists sit in columns, dividing up the board. And, it is here that you store content - everything from descriptions and file attachments through to interactive checklists. The final feature within these boards are the Cards. With these, you can specify tasks, drop them within lists, colour-tag, provide a due date, comment and even archive the content.

How a COO uses Trello day-to-day

Personally, I use Trello nearly every minute of the day. It sits just behind my emails in the ranking for my most used applications. Within the boards, you'll find my To-Do List. I create individual cards for every task I have scheduled, from sending an email through to writing a new policy. Some cards remain empty, apart from their titles. Others have a raft of information within them, built-up over time and giving me all the details needed to complete the task.

By flagging Due Dates for each card, Trello creates a visual tool that alerts me to when a task needs completing urgently. I have also implemented a 'Card Ageing Function' which wrinkles and pictorially ages any card that remains inactive for too long. Currently, you'll find between 20 - 50 cards in my daily To-Do List. A long-term list of Non-Urgent Tasks and a Waiting List also fill my boards. And finally, I have a list with general information, such as agenda items for the next board meeting or a collection of intriguing articles I wish to read.

In my previous article, we looked at the importance of emails within the legal sector. And here too, Trello provides organisational benefits. If I cannot deal with an email immediately, it moves into my To Do Outlook folder and a note is added to Trello with a Due Date flag for responding.

My regard for Trello is something I speak passionately about with the members and staff at The 36 Group. It has become a well-honed tool within our teams, supporting the heavy work-flow and task lists for many areas of these practices. Again, I am delighted that people are willing to adopt new technologies that are in place to create positive change within their work. Alongside Trello, our Family Team relies heavily on Basecamp while Microsoft Teams has become essential for fulfilling collaboration requirements internally too.

As we continue to become increasingly reliant on technology to streamline workflow, the importance of well-structured and user-friendly tools has never been so important. At The 36 Group, we continually address and update the channels that we use. A focus on ensuring productivity and technology is embraced on equal levels allows us to move through projects with speed and professionalism. In my next article, I will be discussing Password Manager - another application that has become ingrained in my professional life. For now, I am interested to know whether Trello forms a role in your business or personal organisational set-up? Or, have you found other tools to be more malleable and suited to your needs?

'Simplicity is the soul of efficiency'