Productivity Bootcamp
Time and Email Management for Lawyers

October 17, 2019

Bill Jawitz
Matt Portella

SuccessTrackESQ
Law Office of Matthew V. Portella, LLC
ABOUT US

- Name
- Years in practice
- Primary practice area
- # of attorneys and staff
- Bill: 18 years coaching attys
- www.SuccessTrackESQ.com
- Matt: 25 years in practice
- www.MVPLawOffice.com
THE EIGHT ELEMENTS

1. Plan Effectively
2. Capture & Update Tasks
3. Prioritize & Schedule
4. Delegate & Supervise
5. Organize Info
6. Optimize Procedures
7. Frame Expectations
8. Cultivate Awareness
3 INTERDEPENDENT DIMENSIONS

Firm culture
Team norms
Individual behavior
MATERIALS

PRACTICE DEVELOPMENT RESOURCE PACK

Text “RESOURCES” to 444999
TWO TRUTHS

If you don’t control your time, other people and events will

There is always more to do than time available
THE GREAT MISNOMER

We can’t:

Get more time
Have more time
Make more time
Find more time
It's self management

It's choice management
4 CHALLENGES

**Internal**
Resistance to change; “Not enough time”

**External**
Always-on tech clients / colleagues

**Firm culture**
No Single “Best” Method
SPAN OF CONTROL*

What can you **control**?

What can you **influence**?

What is truly **beyond** your control or influence?

*Caveat: Organizational Hierarchy*
GOALS AND OBJECTIVES

**GOALS** are aspirational

**OBJECTIVES** are measurable states in time

Get clear, get specific
If you were more productive and enjoyed greater peace of mind one year from today, what would you have gotten better at?
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A PREREQUISITE

Knowing your destination

Vision for your practice
PLAN EFFECTIVELY

Daily
Quarterly
Annually
DAILY PLANNING
15 – 30 Minutes First Thing

1. Note the day’s free space
2. Block communication time
3. Review written task list
4. Select 1 – 3 top items
5. Project realistic time for each
6. Enter those blocks
7. Scan rest and next week
8. Execute adjustments
DAILY TEAM PLANNING

Review schedule
Communication
Action on files
Admin tasks
CAPTURE & UPDATE TASKS

Accessible and Trustworthy

- ToDoist / Outlook Tasks
- Practice mgmt platform
- OneNote
- Three ring binder
- Legal Pad (NOT white or yellow)
5 TASK CATEGORIES

1. Production (legal work)
2. Delegated production
3. Administrative
4. Marketing
5. Personal
PRIORITIZE & SCHEDULE

- Urgent and Important
- Important but Not Urgent
- Urgent but Not Important
- Not Important and Not Urgent
CONFLICTING PRIORITIES

Make criteria explicit
Removal of impediment
External deadlines
Speed to revenue
Capacity building
Most satisfying
TIME - TASK ESTIMATES

Check whitespace
Determine scope
Pause to reflect
Add 33%
Track for one week
THE MYTH OF MULTITASKING
SEE FOR YOURSELF

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DELEGATE & SUPERVISE
EFFECTIVE DELEGATION

Specificity
Level of authority
Feedback
FEEDBACK

During and after, depending on assignment

FAST Feedback

Frequent
Accurate
Specific
Timely

IT’S OKAY TO BE THE BOSS
THE STEP-BY-STEP GUIDE TO BECOMING THE MANAGER YOUR EMPLOYEES NEED
BRUCE TULGAN
AUTHOR OF MANAGING GENERATION X
BE THE CONDUCTOR

People need – and want – to be managed well

Salary is 11th most important reason top performers remain with their employer
RPC 1.1
Competence

A lawyer shall not:

• Handle or neglect a matter ... in such a manner that the lawyer’s conduct constitutes gross negligence

• Exhibit a pattern of negligence or neglect in the lawyers’ handling of matters generally
A lawyer shall act with reasonable diligence and promptness in representing a client.
RPC 1.4
Communication

(a) A lawyer shall fully inform a prospective client of how, when and where the client may communicate with the lawyer

(b) A lawyer shall keep a client *reasonably* informed about the status of a matter and promptly comply with reasonable requests for information
RPC 1.4
Communication

(c) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation (enough time to process, verifying conversations)
RPC 5.1
Supervision

(b) A lawyer having direct supervisory authority over another lawyer shall make reasonable efforts to ensure that he/she conforms to the RPC

(c) A lawyer shall be responsible for another lawyer's violation of the RPC . . . (orders, ratifies, or knows of)
RPC 1.6, 1.7/8

• Confidentiality of Information
• Conflict of Interest

(investing time and $ in appropriate technology)
5 ORGANIZE INFO

information, overload, multitasking, instant messaging, cellular telephony, news, media, data, computers, reports, spam, e-mail, internet, RSS, data smog, e-mail, spam, information pollution, data, contradictions, stress, inaccuracies, distractions, numbers, interruptions.
SEARCH STATS

25% Time spent looking for information

38% Time spent recreating existing content after failed search

61% Annual growth in enterprise info
Password Management

DISCOVERY

Knowledge revealed.

X1 provides blazingly fast access to information that people need to maximize their productivity and make the best decisions.

Dashlane

LastPass

RoboForm
PAPER & DIGITAL FILING

Folder location and naming conventions

Hire a professional organizer
(Laura Leist, EliminateChaos.com)

Calendar monthly time
80-20 RULE

20% Inputs → 80% Results
SMOOTH PROCESSES

Intake / file opening,
Calendarin
Drafting
Admin
Client /biz
Apply 80-20 rule

SMALL
CHANGE
BIG
IMPACT
EFFICIENT TOOLS

Office 365

Zoom Video Conferencing

Dragon Professional Individual
TEMPLATES & SHORTCUTS

Keyboard shortcuts

**Macros** *(PhraseExpress, ActiveWords)*

Word templates

Email templates

**QuickSteps** *(Outlook)*
TRAINING INVESTMENT

Paradox: must devote time and $ to use time more effectively

Most overlooked contributor to organization-wide productivity
MEETINGS

• Purpose
• Punctuality
• Action Commitments
• Specific Communication
• Follow-up
• Death by Meeting
TIME SPENT ON EMAIL

Forty 10-hour days

400 hrs
TAKING CONTROL

Email mgmt = core work responsibility

4 Key Strategies

1. Reduce Volume
2. Improve Quality
3. Manage & Organize
4. Teach Others
STRATEGY #1
Reduce Volume Out & In

1. Send less spam, filters
2. Dispense with internal “Thanks!” (and greeting)
3. Educate top offenders
4. Use separate addresses
SEND LESS EMAIL

Why are you sending THAT message?

Does the recipient need it then – or at all? (minimize RTA’s / cc’s)

Is email the best channel?
BLOCK & UNSUBSCRIBE

offer will not be honored unless reservations are made at www.airparkparking.com

offer can not be combined with any other offer or source other than airpark.
if your confirmation number does not start with "apps" you do not qualify for offer. you must book through our website

This email was sent to bill@jawitz.com by airpark/ Air Park Airport Parking Systems
Airpark JFK Inc., 153 44 South Conduit Jamaica, NY 11434

Unsubscribe | Sender Info | Report Abuse | Forward
Enflyer The Email Marketing Experts
STRATEGY #2
Improve Quality

Get better and faster responses (everyone else is swamped too)

Effective subject lines

Effective body content
QUALITY SUBJECT LINES

Be descriptive and specific

Use prefixes and suffixes

Change subject line instead of re-using an old email

EMAIL SUBJECT LINES

YOU KNOW YOU WANT TO OPEN ME...
SPECIFICITY & PREFIX / SUFFIX

**ACTION:** Schedule Jones mock depo for 12.5, 2-7pm

**DELIVERED:** Baker summary judgment motion for your review

**INFORMATION REQUEST CONFIRMED**

**EOM** (end of message)

**NRN** (no reply needed)
Dear Bill: Thank you for your quick and efficient assistance today on this. I wound up doing a combination of my wording and yours (see below) and really wanted to send it out before the day passed as people wanted answers and want to plan their time. It has been sent and we shall see how it evolves. Interestingly, in a conversation with [redacted] yesterday, she thought it would not be a problem if 2 paralegals were out at the same time, specifically [redacted] and [redacted] with [redacted] being the only para here. [redacted] requested several days that [redacted] already had been granted off. Apparently Vivian spoke to [redacted] and said she has at times been the only para in the office and so it should be fine. I am not surprised at [redacted]'s position but was surprised & disappointed by [redacted]'. I am not even sure what time period [redacted] is referring to, but if she was the only one it was likely a time when we were just not fully staffed or time was taken that was unplanned etc… — I would not have knowingly authorized time out so that there was only 1 paralegal in place for any length of time. I think it is absurd. Thank you and have a great weekend!
BODY FORMAT

1 topic per message
Main points, attachments & instructions at the top
Section headers
1 thought per paragraph
Line breaks & bullets
STRATEGY #3
Organize & Manage

Use sub-folders and rules / filters

Customize toolbars

Use YouTube to learn how

KEEP CALM & FOLLOW THE RULES
SUB-FOLDERS AND RULES
Yes, exactly. I wanted to hit on some of the topics you’ll be covering at the seminar. I reviewed the materials from the program and identified a few spots that look good, in no particular order:

- productivity roadblocks
- value of delegation
- email efficiency
- how to deal with people who waste your time
- the ethical and mental value of good time management

On Fri, Dec 15, 2017 at 11:35 AM, Bill Jawitz <bill@successtracksq.com> wrote:
My pleasure Kate. Is time management the topic for the interview?

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Bill Jawitz
Via mobile

On Dec 15, 2017, at 6:49 AM, Kate Coscarelli <kate.coscarelli@gmail.com> wrote:

That’s perfect. Thanks so much for fitting me in. I’ll see you when you get to the Law Center!

On Thu, Dec 14, 2017 at 9:31 PM Bill Jawitz <bill@successtracksq.com> wrote:

Decided to come down Wed night, so I can be there earlier on Wed – even 8 or 8:15.

Kate – will that work for you?
STRATEGY #4
Encourage Others
Model best practices
Identify top offenders (volume and quality)
Provide resources
Propose specific incremental change
FRAME EXPECTATIONS and BOUNDARIES
STANDARDS & BOUNDARIES*

What people can expect from you

What you’ll allow

Calibrate / re-calibrate with constituents

What do we expect from each other?

*On and off the bench
DO UNTO OTHERS

3 interdependent dimensions
Balance self interest and group interest
Mutual accountability
ASSESS URGENCY

Define “emergency”
Downstream impact
Mindfulness
Span of control
Batch questions
EVERYONE’S FAVORITE RADIO STATION

WIIFM

What do you need to get from people so you can give them what they want?
COST OF INTERRUPTIONS

Stress: higher risk of mistake, increased rework, longer hours, more frustration

*Multi-Tasking Myth Exercise
TURN OFF EMAIL AND TEXT ALERTS

Cortisol addiction

Hour or 2 daily

Try it for two days

Search YouTube to learn how
PHONE INTERRUPTIONS

Establish timeframe at the front end of each interaction

Try putting phone on DND
THE HEALTHY NO

What to Say No To

Doubting edge requests:
“Is that a thing we’re able to accommodate now?”
Fixing other people’s mistakes and crises
“Scooping more
We’ll be able to get to that in __ days/weeks”

Acknowledging request:
“That’s not something we’re able to accommodate now”
Then offer what you CAN do:
“We’ll be able to get to that in __ days/weeks”
Personality Style
Emotional intelligence
Resistance to change M.O.
Mindset, Skills, Routines, Minute-by-Minute Choices

CULTIVATE AWARENESS & MINDFULNESS
KNOWING SELF & OTHERS

**DISC Style Indicator**
- **Drive**
- **Influence**
- **Steadiness**
- **Compliance**
Paying attention in a particular way; on purpose, in the present moment, and non-judgmentally

Jon Kabat-Zinn
MINDFULNESS

Being your physical, emotional, and cognitive best

Inherently stressful and often repetitive environment
MINDFULNESS

The Work of Lawyering
Analysis
Advocacy
MINDFULNESS

The Work of Doing the Work

Planning  Scheduling
Prioritizing  Supervising
Organizing  Optimizing
MINDFULNESS

Why do I chronically under-estimate task-time?

What’s keeping me from making a change I know would be good for me?
What are the healthy and unhealthy ways I deal with pressure?

Should I pick up the phone at this moment?
MINDFULNESS

Techniques

3 Deep breaths

1-minute breath meditation

1-minute body scan

Apps (Insight Timer, Calm)
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FIVE FROGS WERE SITTING. . .
SUCCESTRACKESQ.COM

SuccessTrackESQ.com/testimonials

Ask Me!  
JumpStart  
Consult

PRACTICE DEVELOPMENT RESOURCE PACK

Text  
“RESOURCES”  
to 444999  
bill@successtrackesq.com  
203.806.1300