

## **Leadership, Time Management, Stress Management, and Self-Care**

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These materials are designed to help you take notes during the program and guide future study after the program. They were jointly prepared by the program panelists, Phil Raine, Sarah Read, and Anne Chambers using resources each contributed.

### **Time as a Leadership Issue**

There is a reason why the axiom “Lead by example” has stood the test of time. It is hard to delegate and manage others if you can’t manage yourself.

Think about the best boss and worst boss you have ever had, then think about the ability of that person to manage themselves. Usually, the best bosses will have a well-managed life. They will prioritize health, self-care, and time management. You can count on them to get their part of the work done in a timely basis. In contrast, the worst bosses will usually have a lot of problems in their life. These may be health problems, relationship problems, or self-care problems. In addition, the worst boss was likely very demanding of your time - expecting you to work at all hours or odd hours. Which one of these leaders do you want to be?

*“The three most important ways to lead people are:... by example... by example... by example.”*  
*-Albert Schweitzer*

Self-management and leadership are intertwined because you are most effective at leading others when you have mastered the art of self-management. This is not to say that leaders are perfect; leaders have slip-ups or personal flaws. What leaders do better than others is to manage those flaws in a way as to minimize distractions to their ability to lead and maximize the effectiveness of their leadership. Self-awareness leads to self-management.

<b>Notes: How do you lead yourself? Others?</b>
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Recording time (what, why, how) is an important tool both for self-management and for managing others. The benefits of proper time-keeping include

1. Better estimates for clients
2. Better use of client’s money
3. Better ability to delegate tasks
4. Better relationships with those who depend on your time
5. More time!
6. Less stress!
7. Better life!

Another benefit is identifying where you are losing money so that you can make adjustments and have a more profitable practice. Lawyers who fail to manage their time well often fall into what we call the “Lawyer’s Time Management Ponzi Scheme” illustrated by the following:

	Additional Hours	Total Hours	Pay	\$/hr	\$/yr @ 2000 hrs
Case 1:		10	\$1,000	\$100	\$200,000
Continuance (1):	2	12	\$1,000	\$83	\$166,667
Continuance (2):	2	14	\$1,000	\$71	\$142,857
Letter Re Delays (1)	1	15	\$1,000	\$67	\$133,333
Continuance (3):	2	17	\$1,000	\$59	\$117,647
Letter Re Delays (2)	1	18	\$1,000	\$56	\$111,111
Review File to Calendar to dos	2	20	\$1,000	\$50	\$100,000

As the above illustration demonstrates, poor time management lowers the value of your time. Time is also a finite resource. No matter how hard you try, there will only be so much of it. Even if you were able to bill all of the time above at an hourly rate, you are still losing time that could be spent on other tasks - more work, happier clients, or more personal time.

So a final benefit of time management is that it not only helps you manage your money, it helps you manage your life. That includes understanding when, why, and how you procrastinate so

that you waste less time and do more of what you want. We address procrastination further below.

**Notes: How well am I using my time? Where might I improve?**

## **General Strategies and Resources for Time Management**

There are many time management systems and tools. What are the best time management methods? The ones that work for you! Keep this in mind as we work through the following tools. If you have a good system without problems, there is no need to develop a new system. Only look for new systems when the current one no longer functions. Avoid having so many time (or self) management systems that they start to conflict.

### Organizational Tools

Pen and paper Methods:

- Use a paper calendar or planner. Make this your only calendar, or take some time each week to synchronize with other calendars (family, docket, etc.).
- Use accordion folders to organize paper documents by when they need your attention - you can organize by day of month or by day of week and rotate through.
- Pen and paper to-do lists. Use post-its or note pads to track what you need to do. While this is limited to one location and can be hard to transport, there is a sense of satisfaction from getting to toss or cross-through a to-do item, and tasks are kept in view (and in mind) at all times.
- Have good document file management (paper, electronic, or both). Even if you can search for something electronically, a good system will save you time searching for documents. Keep things organized using filing cabinets, files, and staff help so documents are easily retrievable.

Electronic Methods:

- Organizers built into smartphone or email software, such as Microsoft Outlook, Gmail, and iPhone or Android default apps. These include calendars, task lists, and reminders. The benefit of these is that they generally communicate with each other - so your email can automatically create calendar entries for your or to-dos, and reminders can pop up alongside calendar entries.
- Specialty apps or products. You can also unbundle the tools you use. These often have better features and functionality because they are purpose built, but may lack the ability to communicate with other parts of your life.
  - There are lots of great task list apps, like Remember the Milk, Wunderlist, or MyLifeOrganized.
  - For tracking time, you may try using Toggl to track what you day every day, even if that ends up being not billable time.
  - For notes and recording thoughts, Evernote is popular.

- Passwords can be organized with a password manager like 1Password or LastPass, which require you to remember one master password but then not remember any other passwords.
- Trello is a good resource for project management across teams.
- The best electronic method: the one you will use. If you spend time downloading an app, setting it up, but then don't consistently use it, then you have a net time loss from the app.
- CAUTION: electronic organizers can lead to greater productivity, but can also be a distraction. For example, notifications of new emails. If the email notification distracts you from focusing on the task at hand, turn it off! There is no rule that you must respond to email immediately, only that you should be timely in your response.

### **Understanding And Managing Procrastination**

Lack of communication and lack of diligence are the top two ethical complaints clients make about attorneys overall, not only in Missouri but in general. In 2017, these two categories combined were involved in 81% of complaints resulting in OCDC investigations. When procrastination is a concern, gains in minimizing that tendency can be helpful to avoid problems and protect your bottom line. Procrastination can generate practical challenges, stress, financial loss and sometimes ethical dilemmas. For some, procrastination appears to act like a personal trait, bound to negative emotions.

Styles of procrastination include the *rebel*, the *worrier*, the *over-doer*, the *perfectionist*, the *dreamer*, and most recently, the *cyber-slacker*. The perfectionist is one of the most common. Some factors that play into procrastination include time management concerns, disorganization, dilatory strategies, boredom, professional stress and burnout, substance use, and attention deficit concerns. Here again self-awareness is an important part of self-management. Recording and analyzing your time will help you spot patterns. Ask yourself at the end of every day, what am I avoiding, when, and why? Keep a journal with your answers and look for patterns. Then you can begin to decide how to lead yourself out of "the procrastination zone"

Here are some strategies that are helpful in overcoming procrastination:

- Divide big projects into baby steps or chunks. Set your timer for 30 minutes or an hour to work on the task. When it goes off, decide if you want to reset it for another time block. Most tasks seem more manageable when broken down. Once started, attorneys often find their groove and keep going.
- We tend to put off tasks that are less interesting to us. To balance that out, try layering your workday by doing a task you like less for a while, then one task you love. Repeat this throughout the day. Looking forward to getting to the tasks you enjoy most can drive you to move through those you find less interesting.
- Just dive in somewhere. Just do what you can.
- Motivate yourself. Picture an incentive and dangle it in your mind's eye. Imagine your success with the project done on time, reaping the benefits. Picture yourself literally doing the task, then get started. You can also envision the sheer opposite situation in which you finish the task late or not at all, then picture yourself experiencing the fallout.
- If a skill deficit plays into procrastination, become more proficient and confident at it over the next few months by doing professional reading or attending related training.
- Identify tasks best delegated or referred elsewhere.
- If you perform best under pressure, try planning a “nightmare day”. List tasks you have been avoiding and do them on that day. This strategy is good for attorneys who like a challenge or deadline. You can turn this into an office project by ordering pizza, say on Fridays.
- Cyber slacking is the newest form of procrastination. If you must cyber slack, do so as part of your reward or break.
- Stay focused on customer service by minimizing electronic overload. When seeing clients, log off your computer, do not disturb your phone, silence your cell phone and reduce distractions.
- Instead of procrastinating for long unspecified periods of time, try doing so briefly on purpose. Lay out your material, set your timer for a short interval like 3 minutes, literally do nothing for those minutes, then get started.
- Self-care matters. Instead of sacrificing vacations, take them. In the long run savoring your down time helps increase productivity and burnout.
- If a personal concern is driving the procrastination, it is important to address the underlying concern. Help is available by contacting the Missouri Lawyers' Assistance Program at 1-800-688-7859 for free, confidential assistance.

### **Time Management, Self-Management and Taking Care of Yourself**

An important part of time management is making time to attend to other areas of life than your law practice. The fact that lawyers often don't take care of themselves is well documented in a recent report from the [National Task Force on Lawyer Well-Being](#).

This report contains a number of recommendations for all sectors of the legal arena about steps individuals and firms can take to improve lawyer well-being. Anne Brafford, JD developed the [Well-Being Tool Kit for the Legal Profession](#). This free, practical toolkit offers resources for

attorneys seeking to improve their sense of well-being. It focuses on creating a positive stress mindset and building a healthier mind, body and heart. Worksheets on using your strengths and creating a customized happiness plan are included. We recommend that you review it!

**Notes: In what areas where I would like to reduce stress or get more support?**

**Build A System That Works for You** *(This text and the goals worksheet are from forms Sarah Read developed for her law practice management practice. Used with permission.)*

When it comes to time management it is important to find a system that works for you. A good time management system will reflect your unique make-up as an individual – what you enjoy, what you avoid, the time of day you feel energized or tired, the type of work you do, and your non-work activities. For this reason it is not possible to recommend a single type of planner or system. Although each type of commercial planner or time management system has its adherents, the fact that that system works for your spouse, best friend, or partner, does not mean that it will work for you.

So what is time management? Time management is a way of approaching your life so that you do more of the things that you would like to do. A time management “system” is simply a way of coordinating your days and activities so as to minimize stress while accomplishing more. The following will help you think about the different components of a time management system and what might work for you.

**HOPES, DREAMS AND GOALS.** The dictionary defines a “system” not only as “an organized method” but also as “a network of structures and channels” and “as a condition of harmonious, orderly interaction. One thing you need for an effective time management system is a sense of the direction that you would like things to “flow.” This direction must be one that works for you in both a personal and a professional sense. You cannot, for example, effectively manage a professional life that takes 75% of your waking hours if your happiness depends on spending 50% of those hours with your family and friends. We have provided a separate worksheet that will let you think about what your goals (or dreams) are in different areas of your life and to assess how those goals intersect and how they might be integrated, and to identify steps you might take toward achieving them. Using this kind of tool will also help you say “No” to things that aren’t aligned with your goals and set priorities among competing demands. Saying “No” to things that aren’t aligned with the direction you want to go is a key part of managing time. If you have trouble with this, read [The Power of A Positive No](#) by William Ury (Bantam, 2008) which will help you say “yes” to what you want to do, by saying “no” to more of the things that take you off track.

**COLLECTION POINTS.** A collection system is a way of gathering all your “to-dos”, reminders, messages, and as well as random thoughts and ideas of what you might do some day. Such a system ensures that none of these get lost. Such a system also eliminates both the stress associated with trying to remember all of these details and the disruption that comes with inadvertently failing to remember in a timely or convenient way. Here is an example of how a “collection point” works: as a lawyer, mother, and active volunteer, I had many occasions during the day when I would (i) be asked to remember to do something, (ii) need to commit to a date, or (iii) think of things I would like to do when I found the time. I used my voicemail as a “collection point” for all of these. If a client asked me to do something, I would record a message as I left a meeting. If one of my kids let me know (usually as I was cooking dinner) of a play, party, or other event that needed to be calendared, I had her call my voicemail. If I thought of “to-dos” or ideas as I drove along, I called my voicemail. Whenever I returned to my office, I played the voicemails, added the appropriate dates to my calendar (including interim dates for completing work or tasks related to a “due date”) and the appropriate items to various to-do lists. As another example, when I leave the office, my staff “collects” messages (whether internal or external) and leaves them in a designated spot for me to pick up and review. The same is true of mail. Regardless of who receives or picks up the mail, it is left in a designated spot to be “collected” by me.

**SORTING “BUCKETS”.** While a “to-do” list is helpful, a series of lists that help you “sort” according to various priorities or options is even more helpful. You can, for example, distinguish between short term and long term projects; items for immediate action and ideas to be revisited; administrative work and client work; items that are urgent and important, urgent but not important, important but not urgent, etc. This will help you set priorities, delegate effectively, avoid unnecessary “crises”, and, in general, to lead a more fulfilling life. Once you effectively start sorting you will find yourself naturally grouping actions and tasks in ways that efficiently use your time (such as running errands on the way back from a client, or creating a new form to be used in future matters as you work on a current matter).

**DISTRIBUTION POINTS.** Once you identify and sort what needs to be done over a particular time frame, think about the most effective way to “distribute” that work within your schedule. First, what can be delegated in whole or in part, and if delegated when and in what form do you need it back? How are assignments made, documented and followed up on? This could be at a regular staff meeting, by a daily exchange of lists and related notes, or through a computer program. What tasks can be accomplished by a short phone call? Put that list by your phone to work through as scheduled calls are postponed or delayed. What goes in your briefcase to be read in the evening or on a trip? What goes on a notepad to remind you when you are running errands of something that could be picked up? Your trash can is also a distribution point. If something is neither important nor urgent, throw it out.

**FOCUSING PERIODS.** Some tasks – especially legal tasks – require concentrated effort and are consistently put off because the lawyer has not scheduled times that allow for that focus. Every week should have blocks of time scheduled for those tasks that require such focus. And

every week (and day) should have a regular period in which the lawyer can scan the calendar and focus on the priorities for the upcoming week or day.

**DATA COLLECTION AND EVALUATION.** Even if you do not regularly record hours, you should consider doing so for a “test period” and evaluate how you are actually using your time. I have recommended this many times to lawyers with whom I work, and the standard response I get back when they finally do so is: “Do you know how much time I have been wasting?” Well, yes, I do. So periodically stop and ask: how am I using my time? Am I making progress in the areas I wanted to make progress in? If not, why not, and what changes can be made? What interruptions or distractions can be eliminated or at least minimized? What time can be redirected toward a better use? The incremental improvements that come with regular review and evaluation can pay very big dividends over the long term.

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There are many time management resources on the market, and you can overwhelm yourself working through them. You will be much better equipped to improve your time management and evaluate existing resources if you consider the above and initially use “low tech” efforts to analyze what works best for you. As you develop a system, you will want to train your staff how to use it when they interact with you. They may use other techniques to keep themselves on track and that is fine, as long as their system integrates well with yours.

Following are some worksheets that can help you build your system.

The following worksheet, which is attributed to General Eisenhower, is a great tool for thinking about how you are spending your time. At the end of the day, think about how you used your time and sort your activities into the following categories:

<b><i>THE EISENHOWER GRID</i></b>	<b>IMPORTANT</b>	<b>NOT IMPORTANT</b>
<b>URGENT</b>		
<b>NOT URGENT</b>		

What is important and urgent gets done. If you don't calendar and make time for the "important but not urgent" either your practice fails to thrive or becomes crisis driven. "Urgent and not important" is what I call the interruption zone, and interruptions can be managed by how you manage the people around you. Not urgent and not important is "the procrastination zone". Your time there should be minimal! You can also use this worksheet to sort your "to do" list.

Leadership requires both self-management and purpose and direction. The following worksheet can help you define both.

### **GOALS WORKSHEET INSTRUCTIONS**

On the next page is a matrix designed to assist you in defining and setting short, intermediate, and long term goals in 6 distinct areas of your life. The following are instruction guidelines to assist you in completing this exercise. Please read all the way through before starting!

When setting the timeline for achieving goals, generally short term goals are 1 week to 1 month out, intermediate term goals are 1 to 5 years, and long term goals are 10 or more years. For purposes of this exercise, you set the time frame that works best for you. A long term goal for you might be related to the period of time when you expect to retire or to an earlier point in time.

After you have determined your timeline, you can begin identifying your long term goals for each category. Long term goals can be discussed generally such as “travel the world” or “sufficient money to fund my activities in retirement and contribute to savings for grandkids”.

Next determine your short term goals. What is a specific step you can take towards the long term goal? Short term goals are specific action steps and should be more detailed than the long term goal, measurable, and have a definite time frame. For example, before you can become a world traveler, you might want to complete and mail your application for a passport. If you are wanting to fund your retirement, you would budget to set aside specific amounts, follow the schedule set, and also schedule a meeting with a financial planner.

Finally determine your intermediate term goals. These goals can be less specific than the short term goals but should be more specific than long term goals. Again, you will want these goals to be measurable. For example, after you have received your passport, you may want to complete a course within a year that refreshes your high school French or Spanish. For retirement you might want to identify who could take over your practice and what amount you will have saved within an identified range over 5 years.

Now you are ready to begin. You will be completing this form twice. The first time, complete as much of the worksheet as you can in 10 minutes. Try to set out all your long term goals and at least one short term goal per category. After the 10 minutes are up, wait at least a day and then go back through the worksheet to fill in all of the segments, taking as much time as you need.

**GOALS WORKSHEET**

**DATE COMPLETED:** \_\_\_ / \_\_\_ / \_\_\_

	<b>SHORT TERM</b>	<b>INTERMEDIATE TERM</b>	<b>LONG TERM</b>
Professional			
Personal			
Family			
Social			
Financial			
Spiritual			

Here is another worksheet that can help your discern purpose and direction.

**Where Should You Focus Your Energies?**

**THREE THINGS I AM GOOD AT IN MY WORK:**

- 1.
- 2.
- 3.

**THREE THINGS I ENJOY ABOUT MY WORK:**

- 1.
- 2.
- 3.

**WHAT I DO NOT LIKE ABOUT MY WORK:**

- 1.
- 2.
- 3.

**WHAT I WOULD LIKE TO DO MORE OF:**

**At Work**

- 1.
- 2.
- 3.

**Other Parts of Life:**

- 1.
- 2.
- 3.

**WHAT I WOULD LIKE TO DO LESS OF:**

**At Work**

- 1.
- 2.
- 3.

**Other Parts of Life:**

- 1.
- 2.
- 3.

**CONCERNS THAT HOLD ME BACK:**

1.

2.

3.

**STEPS THAT WOULD REDUCE STRESS:**

1.

2.

3.

**THIS WEEK I WILL:**

**NEXT MONTH I WILL:**

**NEXT YEAR I WILL:**

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## Working With Others

In this segment the panelists will discuss 5 things your partner or associate would like you to know.

<b>Associate</b>	<b>Partner</b>
Your lack of planning is not my crisis.	There are times when client needs must come first.
If you need something done early, you have to let me know.	I give you due dates for a reason.
If you have specific knowledge in your head, either add it to the file or let me know before I work on a task.	If you have a question, please ask and don't wait. Same with conflicting assignments - tell me!
Be fair to my time. There may be tasks that would be better for a paralegal or assistant to do, and I may have things outside of work that I need to do.	When billing be fair to yourself, the firm, and the client.
Your feedback really matters to me.	In the long run quality counts more than quantity.

**Notes: What discussions between partners and associates might help your work flow?**

## Further Study

Leadership and self-management both require ongoing learning, assessment and adjustment. It's a life-long process! Here are a few resources we recommend for future study. It is not an exhaustive list! Find resources you enjoy and that work for you.

Two excellent books on leadership are: [Primal Leadership](#) by Boyzaitas et al. and [The Speed of Trust](#) by Stephen Covey. The first will introduce you to “resonant” that work for all generations and “dissonant” styles like the pace-setting style that are often used by Baby-Boomers to the detriment of their relationships with Millenials. The second will help with self-management, purpose and direction, and building both individual and organizational trust. Another resource you might consider is [The Millennial Lawyer](#) by John Box.

The New York Times recently published a lengthy article on [Procrastination](#). It also published a guide on [Productivity](#). Both contain numerous practical tips for reducing procrastination and increasing productivity.

The following is an excellent overview on the mechanics of time management: [Getting Things Done](#) - David Allen. You can find forms and more tips and tools at: <http://www.timemanagementforlawyers.com/articlesdownloads/>

And don't forget self-care and Anne Brafford's [Well-Being Tool Kit for the Legal Profession](#).