

# ATTORNEY WORK-LIFE BALANCE HOW TO PLAN A VACATION



ATTICUS™

*Great Practice. Great Life.*



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# ABOUT US

We help lawyers grow great practices  
and cultivate great lives

- Group coaching programs
- Tailored 1x1 coaching
- Build My Great Team
- Specialized Workshops
- Education and Resources

# LORI PULVERMACHER

## PRACTICE ADVISOR

- Passionate about helping lawyers grow and transition their businesses.
- Prior to Atticus, Lori worked at notable organizations, including:
  - LIFT Consulting, Trainer and consultant in the areas of sales, leadership, communication, and organizational structure
  - Law As A Business (LAB), Director of Business Solutions, Director of Sales, and Lead Practice Solutions Advisor
  - ElderCounsel, LLC, sales, marketing, executive leadership, management
  - WealthCounsel, LLC, marketing, education, and events
- On the Board of Directors for these organizations:
  - Girls on the Run—South Central Wisconsin
  - Spring Green Area Chamber of Commerce
  - Kaul Community Park
  - Ithaca Youth Baseball & Softball
- Girl mom, wife, small business owner, Packerbacker, and a fan of the outdoors





# OBJECTIVES

- Discover the importance of vacation and time away from your practice
- How to prepare yourself and your team, and your family
- How to plan for and prioritize time off
- Tips for creating peace of mind and making a vacation a reality

# QUESTIONS

To ask a question, there are two methods:

1

Use the chat function to send a question.

2

Click the hand icon which can be found in Reactions to indicate you have a question or comment, and we'll call on you. When we do, we will "unmute" you so that you can be heard.

# BENEFITS OF TIME OFF

Increased  
creativity

Avoid burnout

Recharge,  
reconnect &  
rejuvenate

Elevated  
productivity

Prioritization of  
health and  
loved ones

Balance

Training

Testing  
systems

# WHY YOU DON'T TAKE TIME OFF

Guilt

Fear

What will happen?

Cost/expense

What will "they" say?

Nothing will get done

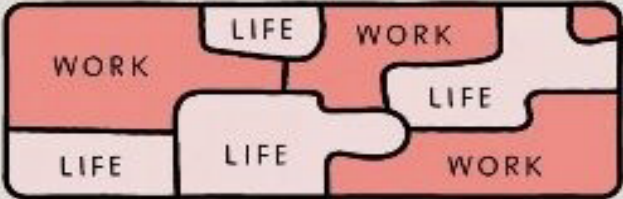
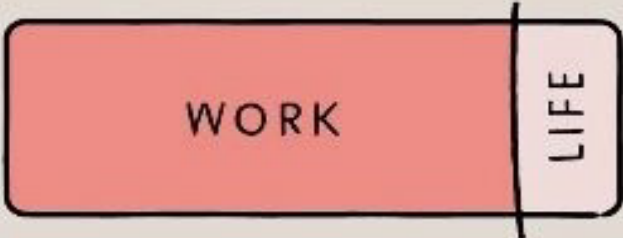
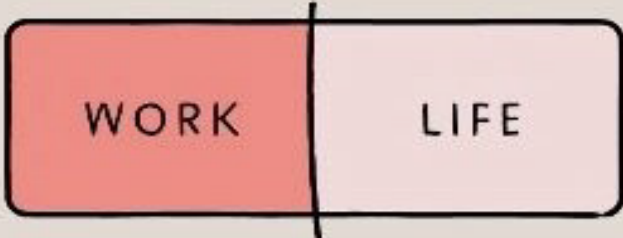
Neglect results in inability

What will I do?

Working too much and too much to do

# WORK-LIFE BALANCE / LIFE-WORK BALANCE

BALANCE IS WHATEVER MAKES  
YOU FEEL BALANCED







# HEALTH CHECK

- I regularly end my day at the same time each workday.
- I rarely work late into the night.
- I rarely work over the weekend.
- I rarely miss important family events or my kids' school and sporting events due to my work backlog.



# REVIEW AND BLOCK

Use your calendar as a tool for securing time off for the things that are important as well as your dedicated vacation time.

# PROTECT YOUR TIME OFF, AND YOURSELF



Kids school  
calendar



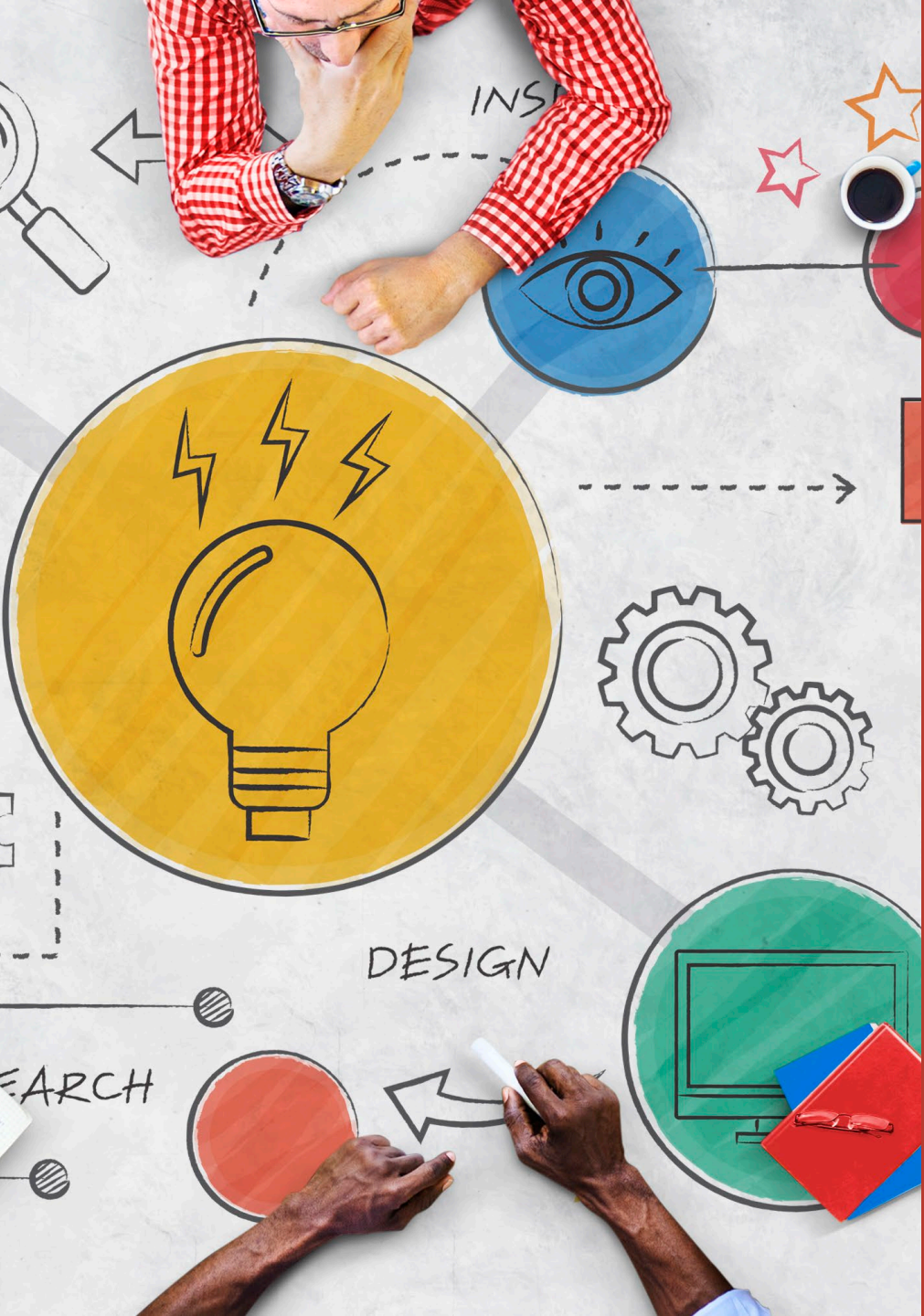
Your key  
vacations



Significant family  
events



Health and  
wellness



# PREPARATION

- Recognize the need for a break and give yourself permission to take one
- Set goals for the vacation
- Communicate vacation plans with your team
  - Assign or delegate tasks and responsibilities
  - Provide necessary resources and training
  - Implement or hone processes



# BEFORE VACATION

- Define emergencies, urgent matters, and appropriate channels for communication
- Establish a protocol for handling urgent matters
- Set your out-of-office and voicemail messages
- Communicate with key clients, referral sources, or others who need to be aware of your time away
- Designate a point of contact
- Clear your to-do list and your desk



# DURING VACATION

- Unplug and limit work-related communications
  - Remove notifications for email, etc.
  - Set a designated time to check in
- Focus on relaxing and being present in the space and activities you've planned
- Make memories and relish in the experience
- Adhere to your plan



# ACCESSIBILITY

- Dedicated meetings for check-ins
- Daily huddle
- Processes and procedures



# AFTER VACATION

- Post-mortem
  - Meet with your team to review what occurred
  - What went well, what did not?
  - Gather feedback and identify areas for improvement
- Document feedback and adjust for next time
- Build in a buffer/transition period
- Prioritize tasks and address urgent matters





# START SMALL

- Staycation
- Partial workdays
- Long weekend
- Practice disconnection by limiting tethered time during evenings and weekends
- Increase delegation to empower your team
- Plan for contingencies in the event of an unexpected emergency
- Outsource and automation

# WHAT WOULD BE YOUR GREATEST VACATION?



# MY GREATEST VACATION EVER

Name: \_\_\_\_\_ Date: \_\_\_\_\_

In the past, my greatest vacations had the following:	
KEY ELEMENTS	TOP 3

To create the greatest vacation ever, the following must occur:	

Top Insight	Top Action

# MY GREATEST VACATION EVER

Name: \_\_\_\_\_ Date: \_\_\_\_\_

In the past, my greatest vacations had the following:	
KEY ELEMENTS	TOP 3

**To create the greatest vacation ever, the following must occur:**


**Top Insight**

**Top Action**

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Orlando



## DOUBLE YOUR REVENUE WORKSHOP™

September 8th, San Francisco



## BUILDING A STRONG LAW FIRM CULTURE PART 4: PROFITABLE HIRING STRATEGIES

August 15th, 2:00-4:00 pm ET

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# Final Thoughts and Questions



Thank you!  
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