

UNDERSTANDING THE VALUE OF YOUR TIME

PRACTICAL TIME MANAGEMENT STRATEGIES FOR THE BUSY LAWYER

PRESENTED BY

Patrick Wilson



September 12, 2023

PATRICK WILSON

CERTIFIED PRACTICE ADVISOR & ATTORNEY

- Atticus recruited Patrick Wilson from the practice of law in order to share his unique insights with other attorneys who need support in their growth and development process. He practiced Insurance Defense and Constitutional law at Mid-sized and small firms.

Since 1999, he has worked with Atticus transforming the practices and lives of attorneys all over the country. He has a particular affinity for Personal Injury practices and loves working with entrepreneurs in the law. He has been a long-time innovator, especially in the field of people management. He loves his clients and his clients love him...his average client has worked with him for over 6 years!

When he's not working, you can find him playing golf, hiking and skiing with his wife and 6 kids in the beautiful mountains of Idaho.





ATTICUS™

Great Practice. Great Life.

ABOUT US

We help lawyers grow great
practices and cultivate great lives



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HELP US GROW: CONNECT AND SHARE

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MORE THAN JUST BEING GREAT AT THE LAW



THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT



Sharpen Focus and
Prioritize



Attract High Value
Clients



Build a Great
Team



Cash Flow
and Profitability

LEGAL SKILLS



Your business skills drive your growth,
not your legal skills.

Your business skills require development.

**Time management is a learned
business skill!**

A small investment in planning your day can pay big dividends for you and your law firm.





**DAYS PACKED LIKE
THIS, GIVE YOU
NO ROOM TO WORK
ON GROWING THE
PRACTICE.**



To grow a practice,
you must adopt strategies
that create room in a day,
protected time, for growth
projects that will generate
revenue.

AGENDA



Plan your day for optimum performance



Create new habits



Protect your time off



Think through your marketing activities



Pivot from calendar-driven to focus-driven

Plan Your Day For Optimum Performance

TIME MANAGEMENT

PLAN YOUR DAY

Beware of being trapped by your calendar

- Big difference between being focused driven and calendar driven



Top 3

15 to 30 minutes

Paper organizer,
post it note, napkin

THE POMODORO METHOD



Set a timer for 25 minutes



Work uninterrupted on a selected task



At the “ding”, you get a 5-minute break



Four “tomatoes” in a row and you get a 15-minute bonus break

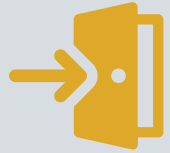


An interruption that you allow means no break, reset and try again...



TIME MANAGEMENT

DAILY FOCUS SPRINTS



Close
Your Door



Close
Your Email



Turn Off
Your Phone



Focus for 25 Minutes –
set a timer



It will be okay. Facebook,
the listservs, your clients,
your world will still be there

TIME MANAGEMENT

THE POWER HOUR

Imagine every day as productive as the day before you leave town for a week!



Set a Timer



Power Hour

TELEPHONE HOURS SCRIPTS



“Mr/s. Attorney isn’t available right now, but I know s/he would like to speak with you -- s/he will be returning calls at 11:00 -- can I schedule a time for him/her to call you?”



Or perhaps I could help you right now.
What is your question or concern?

Create New Habits

USE THE ATTICUS DAILY FOCUSER™ TO BUILD NEW DAILY HABITS AND CREATE ACCOUNTABILITY FOR BOTH YOU AND YOUR STAFF

The Atticus Daily Focuser™



Name: _____ Date: _____

- Exercise
- Spend 15 minutes completing Atticus Daily Focuser™
- Review Calendar, Cash Flow Focuser™ (2 Weeks Ahead)
- Meet with Key Assistant — Top 3 Delegations:
 - 1 _____
 - 2 _____
 - 3 _____
- | Today's Top 3 Objectives: | If Completed, What 3 Are Next? |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
- Change Voicemail Announcement, Check Messages
- Check Email (Delete, Delegate, Delay, Do)
- Return Phone Calls; When _____
- Meet with Production Staff
- Check To-Do Lists
- Marketing Contact for the Day (Did I Ask for a Referral?)
- Check Billing
- Clean Desk at Day's End; Print Tomorrow's Focuser; Make Note of Key Follow-ups

THE ATTICUS DAILY FOCUSER™ SAMPLE

The Atticus Daily Focuser™



Name: Mark Metzger

Date: 2/22/2018

- Exercise
- Spend 15 minutes completing Atticus Daily Focuser™
- Review Calendar, Cash Flow Focuser™ (2 Weeks Ahead)
- Meet with Key Assistant — Top 3 Delegations:
 - 1 schedule lunches
 - 2 draft welcome email
 - 3 create guest list

Today's Top 3 Objectives:	If Completed, What 3 Are Next?
<input checked="" type="checkbox"/> <u>close Smith file</u>	<input checked="" type="checkbox"/> <u>draft Jones trust</u>
<input checked="" type="checkbox"/> <u>case status review w/ team</u>	<input checked="" type="checkbox"/> <u>calendar staff retreat</u>
<input checked="" type="checkbox"/> <u>complete My 90 Day Focus</u>	<input checked="" type="checkbox"/> <u>complete 2 staff evaluations</u>

- Change Voicemail Announcement, Check Messages
- Check Email (Delete, Delegate, Delay, Do)
- Return Phone Calls; When 2:00-3:00
- Meet with Production Staff
- Check To-Do Lists
- Marketing Contact for the Day (Did I Ask for a Referral?)
- Check Billing
- Clean Desk at Day's End; Print Tomorrow's Focuser; Make Note of Key Follow-ups

QUESTION BATCHING

Eliminates 'Lurk and Blurt'

Helps clarify thinking

Propose solutions



STRATEGIES FOR THE SELF-INTERRUPTERS

Turn off notifications
Snooze notifications
Work offline
FocusMe.com



Protect Your Time Off

PROTECT YOUR TIME OFF

RE CHARGE AND RECOVER



Kids school
calendar



Your key
vacations



Significant family
events



Health and
wellness

BENEFITS OF TIME OFF

Increased
creativity

Avoid burnout

Recharge,
reconnect &
rejuvenate

Elevated
productivity

Prioritization of
health and
loved ones

Balance

Training

Testing
systems



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



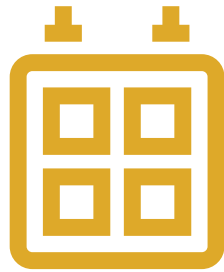
AFTER VACATION

- 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

Think Through Your Marketing Activities

PLAN OUT YOUR MARKETING CALENDAR FOR THE YEAR

THINK THROUGH YOUR MARKETING ACTIVITIES



Do you have a season to your practice?



Do you have a workshop schedule?

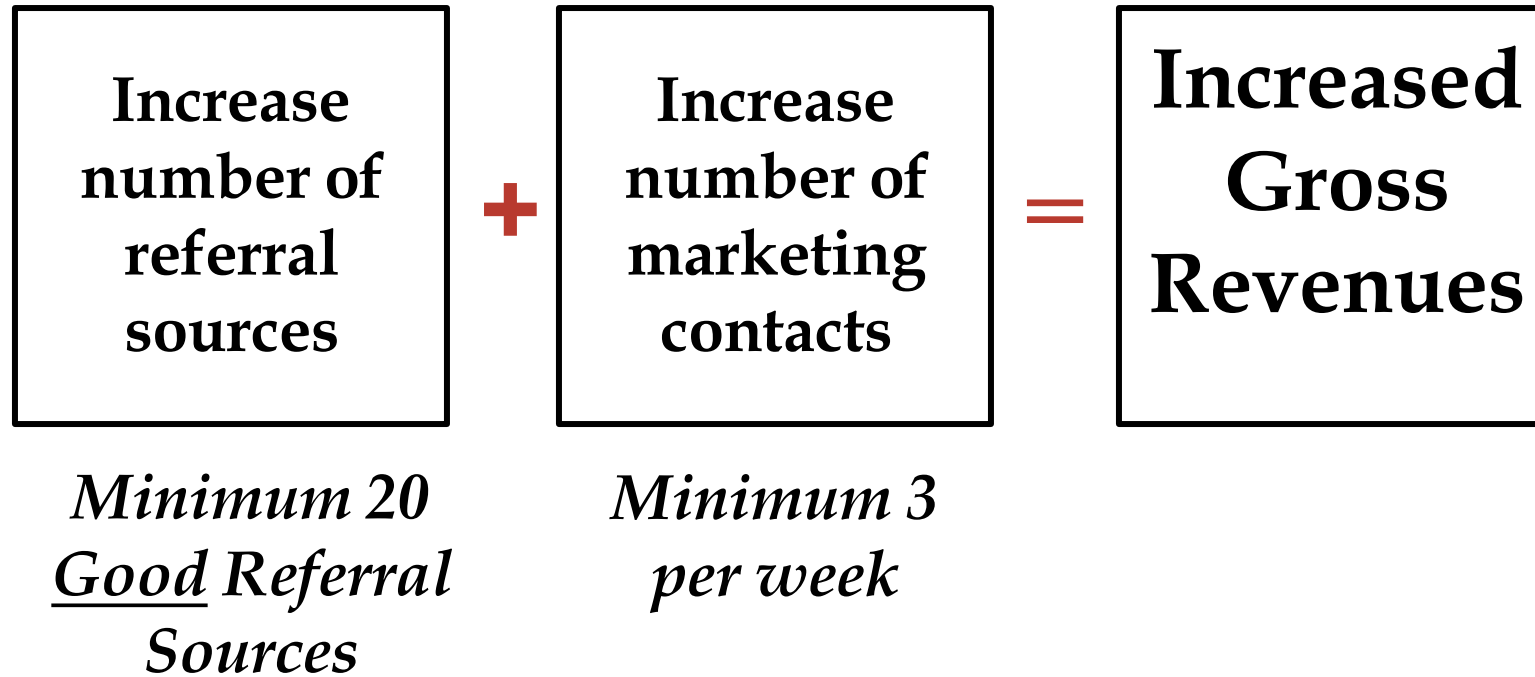


Referral Development- 3 marketing contacts per week-is it possible for you?

WHY DON'T LAWYERS STRATEGICALLY, CONSISTENTLY BUILD REFERRAL RELATIONSHIPS?

- Time-we are time starved
- Skills-I don't know how to
- It's not easy and it's uncomfortable...(terrifying for some of us)
- Not sure what to say or how to ask...haven't developed the basic skills
- Don't want to be perceived as a "salesperson"
- Afraid of looking desperate

Important Marketing Numbers



(Do nothing and get the same results you have now!)

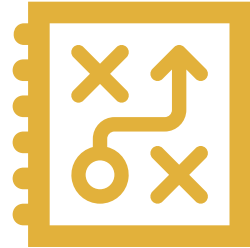
WHERE TO START?

- List out 10 people in your referral community
- Interview 1 referral source per week over the next 4 weeks
- Complete a Practice Growth Diagnostic

DOING GREAT LEGAL WORK, BUT NO NEW CLIENTS?



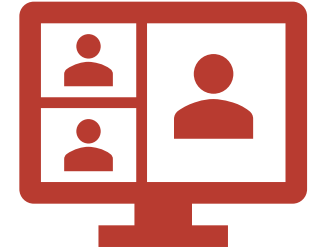
- Marketing is an essential activity for every business
- Without new clients, a law firm won't survive



- Learn strategies to generate consistent, quality referrals and new clients
- Implement tactics to dedicate focus and resources to marketing



- Develop marketing action plans
- Measure your results with the system this program teaches



- Led by a dedicated facilitator
- Virtual group setting
- Learn best practices
- Hear from your peers

Join ***Atticus Rainmakers***

to obtain more leads and referrals, while increasing your attention on essential marketing activities.

You'll also gain an accountability partner and support system!

Pivot from Calendar-Driven to Focus-Driven

DESIGN YOUR WORK WEEK

What does an “ideal week” look like to you

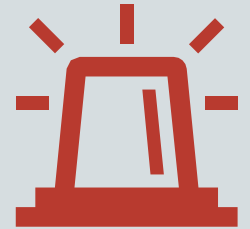
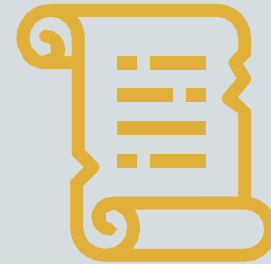
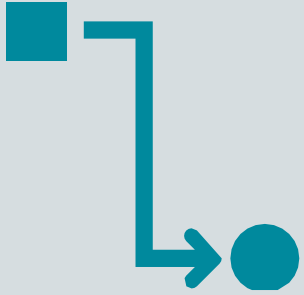
Structure it, design it, then share it

Think through exercise, meetings, clients, marketing, important activities

Use your calendar to structure it

Apply the “block and tackle” method

PRE-EMPTIVE STRIKE STRATEGY



Develop a process
for proactive
contacts

Create templates and
automate
communications

Develop scripts for
your team to use

Define emergencies
and approved
interruptions

USE A TIME TEMPLATE AND SCHEDULE BLOCKS FOR CLIENT APPOINTMENTS

Time Template Worksheet™



	Monday	Tuesday	Wednesday	Thursday	Friday
7					
7.30					
8					
8.30					
9					
9.30					
10					
10.30					
11					
11.30					
12					
12.30					
1					
1.30					
2					
2.30					
3					
3.30					
4					
4.30					
5					
5.30					
6					
6.30					
7					
7.30					
8					
8.30					
9					

What do you need to schedule time for?	Direct Income	Indirect Income	What do you need to schedule time for?
Production			Morning Only
Return Phone Calls			All Morning & All Afternoon
Marketing			Some Mornings & Some Afternoons
Case Status Reviews			Afternoons Only
Client Meetings			After PM
Working on Biz			On Some Saturdays
When are you at your best to do technical work?			Morning Afternoon

Note: This should be the normal schedule you keep. If you are involved in litigation, you will lose the ability to dictate your schedule for periods of time - but default back to this schedule at the earliest opportunity.



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USE A TIME TEMPLATE AND SCHEDULE BLOCKS FOR CLIENT APPOINTMENTS SAMPLE

My Great Week™



	Monday	Tuesday	Wednesday	Thursday	Friday
7	Exercise	Exercise	Exercise	Exercise	Exercise
7.30					
8	Cashflow Focus Meeting	TEAM HUDDLE KEY ASSISTANT		TEAM HUDDLE KEY ASSISTANT	
8.30		Calls/Emails	Calls/Emails	Calls/Emails	Calls/Emails
9	Calls/Emails				My 90-Day Focus
9.30	Strategic Growth Projects	Client Meetings	Casework or Hearings	Client Meetings	Strategic Growth Projects
10					
10.30					
11					
11.30					
12	Lunch with Top 10 Referral Source	Lunch with Top 10 Referral Source	Lunch with Top 10 Referral Source	Take Atty _____ to Coffee/Lunch	Lunch with Top 10 Referral Source
12.30					Calls/Emails
1	Casework or Hearings	Client Meetings	Casework or Hearings	Client Meetings	Possible Free Time
1.30					
2					
2.30					
3					
3.30		Marketing		Marketing	
4					
4.30	Calls/Emails	Calls/Emails	Calls/Emails	Calls/Emails	
5					
5.30					
6		Lead Generation Workshop			
6.30					
7					
7.30					
8					
8.30					
9					

What do you need to schedule time for?	Direct Income	Indirect Income	What do you need to schedule time for?
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Final Thoughts and Questions



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UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM™

San Francisco
Orlando



RAISING THE BAR – GROWTH STRATEGIES FOR 2024

October 12, 2023, 2:00-3:30pm ET



THE GRATEFUL LAWYER – HOLIDAY MARKETING FOR THE SAVVY ATTORNEY

November 9th, 2:00-3:30 pm ET

HOW WILL YOU GROW YOUR PRACTICE?



VITAL STRATEGIES THAT LEAD TO INCREMENTAL CHANGES & GROWTH

ATTICUS RAINMAKERS®

- Increase new case volume through new leads & more consistent referrals
- Elevate your focus & productivity
- Gain an accountability partner
- Experience a peer support system

TEST OUT TAILORED SUPPORT TO INCREASE REVENUE & PROFITABILITY

90-DAY PRACTICE TUNE-UP

- Strategic conversations with a dedicated practice advisor
- Develop focused plans to address revenue & profit goals
- Experience ROI, short & long-run

TAKE YOUR PRACTICE TO THE NEXT LEVEL

PRACTICE GROWTH PROGRAM®

- Dedicated entrepreneurial lawyer facilitator
- Peer group sharing, learning & networking
- Create a great practice & a great life
- Increase gross revenue & profit margin 30%
- Increase average fee per file by 20%
- Increase time away from the office by 25%

Schedule your complimentary consultation to explore solutions and investment options that range from \$300 to \$2000 per month

Thank you!



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