



# Stick

TO THE

# schedule

As legal administrators' workdays become increasingly chaotic, effective time management processes are more vital to ensure the firm's overall success.

BY SHAWN MCNALIS

**Editor's Note:** *This excerpted article is reprinted with permission from the ALA Management Encyclopedia<sup>SM</sup>, an online library of more than 100 original, comprehensive articles from the Association of Legal Administrators. For more information about the ALA Management Encyclopedia and a free sample article, visit [www.alaencyclopedia.org](http://www.alaencyclopedia.org).*

Many legal administrators have experienced not-so-subtle career changes over the years — from managers to firefighters. They rush from crisis to crisis, return phone calls on the run and constantly battle to keep sparks from turning into wildfires. Faxes, voicemails, e-mails and electronic transfers of information increase their accessibility and substantially reduce their available time to respond.

An administrator may respond to such stress by trying to do everything faster. She may take considerable pride in her ability to drop whatever she is doing to handle the next challenge, crisis or

breakdown that presents itself. Ultimately, however, that administrator misses new opportunities to support and improve her firm's performance and to further her own career.

## A NEW APPROACH

A legal administrator *can* have a quality personal life and excel in a career. While no one can ever control 100 percent of his or her time, about 75 to 80 percent of an individual's time can become more predictable if that person knows the right approach to take.

Commit to a proactive approach and leave the reactive behind. Proactive individuals take action ahead of time to pre-empt problems and anticipate upcoming needs; they design their own paths to change. This approach avoids helplessness and resignation, which characterize the reactive approach. Important tasks are planned for and not sacrificed for the seemingly urgent day-to-day issues that may or may not make a difference in the long run. A proactive administrator is seldom a victim of circumstance.

## SHORTCUT

An effective time management process is essential to the long-term success of any legal administrator. Learn how to identify predictable and unpredictable tasks and implement a time template to advance your career and elevate your firm's performance.

### PREDICTABLE VS. LESS PREDICTABLE

The first step to becoming proactive managing chaos is to create a schedule. Legal administrators often say they struggle to set and keep schedules because they cannot predict what will happen day to day. To handle that problem, schedule blocks of time to accommodate the two main types of legal administration tasks: the predictable and the less predictable.

### IDENTIFYING PREDICTABLE TASKS

Predictable tasks include activities that tend to recur regularly, such as weekly staff meetings, partner meetings and payroll duties. Some tasks recur on a semi-regular basis — such as seasonal spikes in the collections process or putting together the annual budget — but most are fairly predictable and easy to schedule. All administrators have commonly recurring tasks that anchor their calendars. These tasks are more stable and tend to recur on a yearly, monthly or weekly basis, even if the time frames shift slightly due to varying circumstances.

Consider the following examples of predictable tasks and identify some that apply to your professional situation.

EXAMPLES OF PREDICTABLE TASKS	YOUR PREDICTABLE TASKS
Weekly/daily staff meeting	
Monthly/weekly attorney meetings	
Accounts receivable/payable	
Yearly/quarterly tax filing	
Annual budget preparation	
Quarterly profit and loss reports	

Long-term projects may also fall into the category of predictable tasks and can become innocent victims in law offices that operate in reactive modes. Too many administrators sacrifice implementing long-term projects because they are caught up dealing with day-to-day emergencies. Because year-end bonuses and administrators' futures may depend on success in implementing long-term initiatives, make sure to identify long-term projects and include them when scheduling predictable tasks.

### EXAMPLES OF LONG-TERM PROJECTS

Preparing/updating job descriptions

Researching/organizing firm benefits packages

Creating/updating policies and procedures

Preparing staff evaluations

Shifting files to long-term file storage

Strategic planning

Planning office moves

Researching case management software

### YOUR LONG-TERM PROJECTS

### IDENTIFYING UNPREDICTABLE TASKS

Tasks that fall outside the realm of predictability often make up the bulk of an administrator's responsibilities. These tasks do not occur regularly, but on demand. When a crisis happens or breakdown occurs, demand is created. Most unpredictable activities are those related to people (often in the form of a staffing problem) and those related to technology.

Staffing issues occur frequently and unpredictably. Without warning, a staff member may quit, requiring an administrator to scramble for a replacement. Or, a paralegal may become ill and be out of the office for days at a time, requiring a massive shift in responsibilities as phone and file coverage are arranged.

Consider the following examples of unpredictable staffing tasks and identify some that apply to your professional situation.

EXAMPLES OF UNPREDICTABLE STAFFING TASKS	YOUR UNPREDICTABLE STAFFING TASKS
Filling in for absent staff members	
Advertising for/interviewing new staff	
Setting up workstations for new staff	
Orienting and training new personnel	
Participating in staff terminations	

The second area of unpredictable activities relates to technology and equipment failure. An administrator can walk into the office one day and find the computer server down. Without an information technology (IT) person on staff, the administrator must see that the server gets fixed. The only predictable characteristic these problems share is that they seem to always happen at a time that is most inconvenient.

### IDENTIFYING SOLUTIONS: A TIME TEMPLATE

To handle both predictable and unpredictable tasks, create a schedule that accommodates recurring tasks and provides uninterrupted stretches of time for important priorities, yet includes maximum flexibility. Block time for everyday tasks that occur in a typical week, for completing important long-term projects and for unstructured time to accommodate emergencies.

Important elements and things to consider:

- Select blocks of time to focus on predictable tasks.
- Select a block of time, usually one hour, as a weekly planning block, the most important block of all. Use this block to schedule the work anticipated for the upcoming week.
- Select a block of time from one to three hours to focus on non-crisis-driven, but very important, activities. This is the time to focus on the highest priority work. The most difficult task in implementing this new time management technique will be to block all interruptions. Do not take random incoming phone calls during this time; take only those specifically related to the items being worked on during that time block. Provide the person who answers the phone a short list of names from whom calls will be taken during this time of highly focused work.
- In this block of time, first meet with staff to ask and answer questions and to delegate tasks. These meetings can help to pre-empt interruptions throughout the day.
- Spend most of this time block focusing on priorities.
- Spend the last part of the time block returning accumulated phone calls. It is important that callers perceive the administrator as still accessible, understand their calls are important and know when they will be able to talk with him or her.

### CHALLENGES TO IMPLEMENTATION

One difficulty in implementing a new process, such as using a time template, is trying to explain it to

staff and co-workers. Their support is necessary to make the administrator's new calendaring method successful. Use what is comfortable in this sample script and modify anything that is not. Provide a copy of the time template to each staff member to illustrate the discussion.

- **Ask staff for support.** Let staff members who usually schedule or help organize the administrator's time know what the time template is and why changes are being made in how time is managed. *"I need your support to help me manage my time better. As you know, I end up working a lot of weekends and evenings, trying to get all my work done. I think that by organizing my calendar differently, and with your support, I will be able to work more normal hours and contribute more to the firm's success."*
- **Explain the time template.** *"I intend to work more regular hours – and focus on more priority projects— by making better use of my time in the office. I am going to manage my calendar in a new way, using something called a time template. The template is not a calendar; we will continue to use our existing calendaring system. It is essentially a set of rules for my calendar that will stay the same, week after week."*
- **Explain the typical time blocks.** *"By following the time template, I may have time for everything that I need to do by not trying to do it all at once. There will be standardized times for me to plan my week, meet with each of you, work on my projects and do my financial and administrative work."*
- **Provide more detail about your production time or power hour.** *"For example, the same times every day will be blocked out to concentrate on my highest priority projects. During those blocks, I will be working on my priorities behind closed doors to avoid distractions. Because we are used to an open-door policy here, that change will take some time to become familiar. But please do not interrupt me unless it is a real emergency."*
- **Explain that you need their support to minimize interruptions.** *"I need your help to protect my time behind closed doors. We need to set up my calendar so that no appointments are scheduled or phone calls put through during this time block. [Direct the following to the person(s) answering your phone.] When somebody calls for me, set up a phone appointment so that I can return the call"*

*immediately after I finish production, during the 'return calls' time block. I will be behind closed doors between 9 a.m. and 11 a.m. working on the highest priority project and will return phone calls between 11 a.m. and noon."*

- **Explain question batching.** *"I will also be incorporating a daily staff meeting. I will meet with you between 8 a.m. and 9 a.m. to answer questions before going behind closed doors. It will be important to "batch" your questions to discuss when we meet. Whenever you have to stop working on a file because you have to ask me a question, don't run in and ask me the question. Instead, jot it down and we will address it in our next meeting. Then pick up the next file and continue working. If we are meeting before you have any questions, review the files you'll be working on in the coming day and try to anticipate any potential questions. Then, write down those questions, and we'll address them all at once."*
- **Explain how the new process helps them.** *"Not only will these daily meetings help me, because there will be fewer interruptions during my day, but they will also help you. With this routine, you'll be able to count on my being available during 8 a.m. and 9 a.m. You won't be continually trying to track me down to get your questions answered so you can finish your work."*
- **Ask for their cooperation.** *"I would appreciate it if you would follow the new rules I've set up. I think it will help us get a lot more work done around here, help everyone to go home on time and alleviate working weekends."*

### WHY IT MATTERS

A firm administrator's job can be filled with frustration, anxiety and a lot of short-term problem solving. This approach to time management may help reclaim personal lives and improve careers by increasing productive time spent on long-term projects — all while still allowing necessary fighting of daily fires while staying on track with goals and deadlines. ✨

### about the author

**Shawn McNalis** is owner and co-founder of Atticus Inc., a training and development company for lawyers and law firms throughout the United States, Canada and the United Kingdom. Contact her at [shawn@atticisonline.com](mailto:shawn@atticisonline.com).

## LEARN MORE

### ALA Resources

These titles are available through ALA's Web site, [www.alanet.org/education/mrc/index.asp](http://www.alanet.org/education/mrc/index.asp).

- *Organizing Your Work Space: A Guide to Personal Productivity, Second Edition*, by Odette Pollar
- *Making Work Work: New Strategies for Surviving and Thriving at the Office*, by Julie Morgenstern
- *The Art of Communicating*, by Burt Decker

The following articles are available in the ALA Management Encyclopedia (ALAME), [www.alanet.org/alame](http://www.alanet.org/alame).

- "Time Management: A Plan That Works"
- "Roadmap for the New Principal Legal Administrator"
- "Make Your Law Firm a Great Place to Work"

The following articles are accessible via ALA's Legal Management Resource Center, <http://thesource.alanet.org>.

- "Life Matters: Creating a Dynamic Balance of Work, Family, Time & Money," by Roger Merrill and Rebecca Merrill — Type in keywords "time management" in the search engine
- "What is Job Stress?" by NIOSH — Type in keywords "time stress management" in the search engine
- "Life in the Balance Achieving Equilibrium in Professional and Personal Life," by ABA — Type in keywords "time stress management" in the search engine

### On the Web

- Mind Tools, "Time Management Skills" — [www.mindtools.com/pages/main/newMN\\_HTE.htm](http://www.mindtools.com/pages/main/newMN_HTE.htm)
- About.com, "5 Categories for Effective Time Management" — <http://sbinfocanada.about.com/cs/timemanagement/a/timemngtsystem.htm>
- Monster.com, "Ten Guidelines for Effective Time Management" — <http://ct.monster.com/articles/tenguidelines/>
- MayoClinic.com, "Effective Time Management: Build Your Organizational Abilities" — [www.mayoclinic.com/health/time-management/WL00048](http://www.mayoclinic.com/health/time-management/WL00048)

### On the Shelf

The following titles are available for purchase or download through many online retailers, including [www.amazon.com](http://www.amazon.com).

- *Getting Things Done: The Art of Stress-free Productivity*, by David Allen
- *Eat That Frog! 21 Great Ways to Stop Procrastinating and Get More Done in Less Time*, by Brian Tracy
- *Effective Time Management*, by John Adair