Time and practice management

Adding client development efforts to your already hectic schedule can be challenging - but not impossible. When you're organized and learn to manage your time more effectively, you'll learn to balance all of your priorities.

Tips on lead management

1. Create an excel file where you have categories for each of the following:
   - current clients
   - past clients
   - lawyers
   - prospects
   - and personal contacts
2. Across the top create the following headings:
   - name
   - company relationship
   - next steps
3. Have this document handy so you can refer to it as you go through the business development cycles.

Time Management and Organization

Start your day with intention

- Take ten minutes at the start of each day to prioritize your tasks and make a list.
- Refer to this list throughout your day (especially when all the distractions come at you). When it appears that everything is a priority, take a second look - use your prioritized task list as your guide.
- Block time into your calendar for your business development efforts - and - stick to it.
- It's more important to do some on a regular basis then none at all.

TIP: INTENTION IS VERY POWERFUL. WHAT YOU COMMIT TO PAPER IS MORE LIKELY TO HAPPEN THAN WHAT YOU DON'T WRITE DOWN.

End your day with intention

- Take the last few minutes at the end of your day to review your task list. Did you get everything done you needed to? If not, how is that going to affect tomorrow?
- Always be planning. Always be reviewing. It will keep you focused and on track.

On a weekly basis

- Get into the habit every Friday afternoon to organize your office and your desk. If files are all over the place, take a few minutes to organize them.
- Think about walking into your office on Monday morning to a clean and organized environment. How will that affect the way you start your week?

Set deadlines for all tasks

- Whether it's a discovery meeting or a trial you are preparing for, a contract negotiation, mediation or article to be published, or a seminar to present - get in the habit of setting your deadlines for completion two days ahead of time. If you can set it even earlier, do it. This will give you the luxury of time. What this does is invaluable.
- By setting your deadline ahead of time, you can allow yourself to break from that task and either focus some time with your business development efforts or other tasks. When you get into this habit you will also find that when you go back to the original task, you'll have fresh eyes and mind, and you're likely to notice something or even many things that you can improve upon. You will make less mistakes and the finished product, whatever it may be, will be better.

Tips to avoid distractions and stay true to your task list

- Turn off your email program until you get your work done.
- If you are working on a crucial file that requires regular contact with the client, then set times throughout the day that you will block off to check and respond to email. You will know for yourself depending on the clients and files that you are working on, how often you should be checking your email. Take control of your technology so it doesn't control you.
- If the phone rings and it is not the crucial client, don't answer it. Again, schedule blocks of time throughout your day to check voice mail.

Plan ahead

- For every deadline, event, meeting, lunch, or networking opportunity - spend a little time in advance making a clear and concise list of objectives you wish to achieve.
- By planning ahead you can avoid having your 'job' or 'tasks', get in the way of your career.

Managing the growth of your practice

- Learn how to delegate work to junior lawyers.
- Start pruning some of the lower paying work, either by sending it to a junior at your firm or by using your referral network and sending it to a lawyer at another firm.
- When passing off clients to juniors, always remain in communication with both the client and the lawyer who serves them.
- Remain the client or account manager on that file so you can ensure the level of service is up to what the client has grown to expect.
- Sometimes this approach may be used for other senior or lateral lawyers at your firm.

TIP: BE READY FOR THE GROWTH. DON'T LET IT SURPRISE YOU.