



Time Management for Paralegals

Presentation for Lunch & Learn
Columbus Bar Association
Presenter: Mary E Coleman



What is time management?

- Time management is the development of processes and tools that increase time-efficiency.



Excuses, excuses. . .

- I have so much to do that I don't have time to worry about time management.
- If I get more organized, they will just give me more work!
- I can't even find my desk, let alone get organized!



Benefits of Time Management

- Organization
- Increased productivity
- A feeling of well-being
- Balanced between work and life



What are the real responsibilities of my job?

- Customer service
- Document preparation (correspondence, pleadings, filings...)
- Document management (records collection/review)
- File organization/management
- Scheduling
- Research




What are the real responsibilities of my job?

- Communication (with the attorneys, staff, opposing counsel, court, etc...)
- Mentoring other staff
- Budget control (for the files and the office)
- Meeting project deadlines on time (or even ahead of time)
- Meeting the professional needs of the law firm and the attorneys



I'm exhausted!

- Most paralegals/legal assistants are overwhelmed with work
- Most paralegals/legal assistants are doing jobs that were previously done by 2-3 people
- Most paralegals/legal assistants, by nature, seek to control the environment




Why worry about time management when I have so many other concerns?

- Time Management is crucial to your development and success as a paralegal/legal assistant
- Time Management is crucial to finding balance between work and life
- Time Management is crucial for your overall well-being



What “robs” me of my time?

- Emails
- Text messages/IM
- Voicemails
- Cell phones
- Co-worker interruptions (that includes the attorneys)
- Administrative tasks (copying, faxing....)
- Clutter



Time Management Techniques

Emails, IMs, Text Messages

- Make a practice to check your email at the beginning of the day, mid-morning (unless you are in the middle of a project), lunch time, mid-afternoon, before you leave for the day
- Turn off the Instant Messenger (IM)
- Turn off your cell phone/blackberry device



Time Management Techniques

The Telephone

- The phone is a huge interruption! It takes you away from the task you are trying to perform
- 1) Schedule no-phone project time (let the caller go to voicemail)
- 2) Schedule time during the day to return calls
- 3) Screen calls (use the caller ID!)



Time Management Techniques

Cell phones, Blackberrys

- When you are in the office **TURN OFF** your cell phone/Blackberry.
- The cell phone/Blackberry is a huge distraction – and, generally, is not work-related.
- If there is a true need to contact you, they have your work number
- Otherwise, let the call go to voicemail and return calls at lunchtime



Time Management Techniques

Co-worker interruptions

- This is a challenge because if you don't handle the situation properly, you can alienate co-workers which you want to avoid.
- Let your co-workers know when you are working on a project
- If you have a person who presents a specific challenge, get the office manager or managing partner involved, if necessary



Time Management Technique

Administrative Tasks

- Schedule the time to post your mail earlier in the day so you can avoid the end-of-the day rush
- Set aside all of your copy projects to be done at one time (instead of multiple trips to the copier)
- If you have a large copy project, suggest that an outside vendor may be more efficient



Time Management Techniques

Administrative Tasks - Filing

- Filing....I hate filing – it is a huge time guzzler!!! However, we all know that filing is imperative so...
- Take 15 minutes every day to do your filing
- If necessary, get help



Time Management Techniques

Office meetings

- This is sticky. When you receive the announcement of the meeting, look immediately at your project list.
- Talk directly to the person organizing the meeting to determine how long and what the meeting is for.



Time Management Technique

Project List (To Do List)

- Prepare a Project List of all pending projects (even if they are ongoing)
- Schedule a time at the end or beginning of your week to review your assignments and prepare a Project List

PROJECT LIST
 Mary E. Coleman
 Updated: April 19, 2009

File Name	Assigning Attorney	Project Description	Due Date
Smith, Donald (TF: Jane Doe) 8947-12345	DSR	1. Collect accident report 2. Collect medical records and bills 3. Collect lost wage information 4. Prepare Demand	SOL (Statute of Limitations): 09/12/2009
Dylan vs. A&M Records 6450-67890	JCA	1. Review documents produced in discovery 2. Organize critical documents per JCA's memo of 1/28/09 3. Research and retain expert	2/21/2009 for memo 3/15/2009 for expert
St. Pier vs. Laurent 4435-34567	CLC	1. Prepare Initial Disclosure of Witnesses 2. Contact IME doctor for review	3/1/2009 (per memo)
Chocolate, Inc. 2343-16789	AJW	1. Check on status of patent documents - due date for filing 6/1/09 2. Check on summary of patent description – 2/25/09 3. Prepare trademark documents – due 6/1/09 with filing for patent – sent to client for approval 1/29/09 – f/u 2/15/09	2/15/09



What to include in the Project List

- Case name (and file number)
- Assigning Attorney
- Project Description/Summary
- DUE DATE (or Statute of Limitations Date)



Project Description/Summary

- You should include a **summarized** version of the assignment (don't write out the whole memo/assignment)
- You may want to put in notes as to status of your assignment (these are for your reference)
- Prioritize the assignments



What the Project List will do....

- Help you to meet your deadlines
- Organize your work load
- Give you “head’s up” on trouble spots
- When an attorney asks you if you have time to handle a new project, you will know what your work load is....(so you don’t make commitments you can’t meet)




What the Project List will do....

- Give you peace of mind
- Allow you to organize your **work week**
- Help you meet your objectives (for example, if you are required to bill a specific number of hours per month or close a specific number of cases)
- At review time, you can use the Project List to provide your manager with a complete picture of your work load



Now I have my Project List, what now?

- Look at your calendar
- Using the deadline dates on your project list, schedule in “blocks” of time to work on the project (if necessary)
- After you’ve scheduled the time blocks, get working!
- When the project is completed, cross-it-off the project list (that’s a great feeling!)



Now I have my Project List, what now?

- Start **every day** looking at your project list AND your calendar
- If you have a large task, break it into manageable parts
- Don't forget to take periodic breaks during long projects (go to lunch with friends, take a walk outside....)



Challenges

- You work for lawyers – there will always be situations where you will depart from the project list. Be flexible.
- Don't be afraid to speak up for yourself. If that means telling a co-worker that you just can't chat because you have work to do or telling an attorney their deadline is just unreasonable – just do it gently.



Miscellaneous

- Get a calendar or use the calendar on your computer
- Keep copies of all the project lists (print them out and keep them in a file)
- Spend time cleaning the clutter out of your work space – a clean space is better for your well-being



Additional Information

- <http://www.getmoredone.com/tips.html>
- Mayo Clinic Time Management: Tips to reduce stress and improve productivity (<http://www.mayoclinic.com/health/time-management/WL00048>)
- Getting Things Done, The Art of Stress Free Productivity, David Allen
- Time Management from the Inside Out, 2nd Edition, Julie Morgenstern