

Making room for new and better work

By Karen MacKay

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We spend much of our time helping firms, practice groups and individual lawyers develop strategies for building profile, developing business and landing new and better work. Working for clients you enjoy serving and doing work that you find intellectually stimulating is personally and professionally gratifying. There are a number of psychological barriers that hold lawyers back: lack of skill, lack of confidence and lack of courage to name a few.

One physical barrier is an office that is piled with paper, filled with files and burdened with disorganization. Look around your office – do you have room for new work? Do the stacks of client files give you comfort that indeed you are busy...enough?

A number of years ago an associate who was probably in her fourth or fifth year spoke to me out of sheer frustration. Her office was jammed with material and she frankly had no idea what to do with it. Indeed, for every piece of work that had been assigned by a senior lawyer, she had opened a sub-file. No one had ever told her what to do with those sub-files. They were never gathered as the file was billed and closed. Overwhelmed by the mess she simply froze and

felt powerless to take on new work or to begin to build her own practice. There was no room in her office or her head for new work.

A chaotic image gives the impression of a chaotic mind – and a chaotic approach to client work. These lawyers often have practice management problems: time doesn't get into the system, client disbursements are carried by the firm for long periods of time because clients are not billed in a timely manner. This frustrates firm management as well as clients. If you are an associate you may not make partner. If you are a partner you are bound to get hit at compensation time because your practice management skills are dragging down firm profits.

Required Equipment

- ◆ *Find a weekend* – this is a great way to use a rainy weekend.
- ◆ *Turn up the music* – you aren't going to do any of the work on your desk you are just going to organize it so turn up the tunes and have some fun.
- ◆ *Alone or enlist help – that's your call* – your assistant can be extremely helpful but it



depends on your style (frankly I prefer to be alone with my junk).

- ◆ *Equipment required* – garbage bags, a shredder, a cart (for stuff that belongs elsewhere so it can be delivered to its proper place on Monday morning). Furniture polish, glass cleaner, markers, plastic trays or boxes and Post-it notes.
- ◆ *Technology* – if you wish to scan some of your older material and file it electronically, get some training on the equipment available in your firm and use it during the process.
- ◆ *Space* – (an empty boardroom close to your office.)

Where to Begin

Bright and early Saturday morning move everything off of every surface in your office. Move it to the boardroom table. Don't worry about the order just get it out of your office.

Empty out the drawers – Clean the drawers and keep enough supplies to fit in your top drawer. Put the rest of the pens, pencils, paper clips etc. into a box on the cart to be returned to the supply room. You can probably save the firm from having to order for a month!

With everything out of the drawers and off your desk, the desk polished and the office smelling good, you can now begin. Make some signs and put them around your office so you can use the floor. Example:

- Filing for closed matters
- Filing for current matters
- Contacts (business cards etc.)
- Reading
- Time
- Reporting Letters and Client Billings
- Library books – they can go directly on the cart
- Your assistant's name
- Names of other individuals with whom you work

The Heavy Lifting

Here's the deal – nothing goes back on your desk. Armed with some sticky notes every piece of paper gets instructions and goes into one of these stacks, or it goes in the garbage.

Things to be filed need instructions e.g. the name of the client, the re line on the file and the file number if you know it.

Business cards, saved paper e-mails and notes of contact names need instructions so they can be added to your database of contacts quickly, efficiently and soon. Put all of that material in a tray or a file folder so that your contact database and be effectively up-dated.

The reading stack can be a challenge – because lawyers have so much to read in order to simply keep up. If the publication is too old it is likely



moot so either put it on the cart for the library or throw it out. You should end up with a reasonable reading pile that can fit into a briefcase. Imagine getting caught up with that on a lawn chair or sitting on the dock. We cannot possibly read everything that typically comes across our desks – the challenge is to pare down your subscription or routing list to a reasonably number of publications that you will actually read. If you are in a large firm meet with the library staff to review your routing list. If you are on your own or in a smaller firm, have your assistant make a note of everything that comes in your mail over the course of a month and pare it down – cancel some subscriptions (not this one!).

Your billable time is your income – it's that simple. Get your time into the system. Practicing law is not an esoteric exercise – it is a skill and a service that has value.

It is fascinating how highly intelligent individuals who grasp concepts easily and quickly, fight the basic laws of practice management with such vigor. If you are really out of control, put all the paper, notes, time sheets etc. into a stack so you can focus on it. Enlist help to get caught up and give someone you respect, nagging rights to keep you up-to-date.

You have several opportunities to show your clients the value you add: from taking instructions, conversations throughout the matter, production and delivery of documents to reporting and billing. The reporting letter and the accounting of the matter are the tangible things that you produce for the client that exhibits some of the value you add to that client. So why is it so difficult to get the report and the account done? It's the Pareto Principle – that 80/20 rule. Why do lawyers get 80% of the work done and leave 20% - the 20% that can be a specific measure of value – in the cabinet, not done?

Library Books and Periodicals belong to the firm and are for the use of those firm members that need them. Get them back to the library. If you don't have time to deal with a periodical that arrives on your list because your name is next on the routing list, stroke off your name and let it move on.

What is left is a combination of stuff that needs to be returned to someone, stuff that needs instructions to someone, stuff that you need to work on yourself and stuff that is garbage. Organize everything within those categories.

David Allen's book *Getting Things Done*¹, provides a process for dealing with all of this

¹ Getting Things Done, David Allen, Penguin, 2003, ISBN 0-670-89924-0



“stuff”. *Do it, delegate it or defer it.* If you can do it in less than two minutes – then do it – dictate instructions, enter your time or put the file away if it needs no action. If you can delegate it – get the instructions done (in writing, in e-mail or by dictation) and get it to someone who can take action. If it can be deferred, file it – but get it off your desk.

Conclusion

If you can wrestle your office to the ground and get your self organized a number of things will happen. You will have more *energy*. You will have a more *positive outlook* about work. You will give yourself permission to *play*. You will be more *relaxed* in the office and at home. You will *get more accomplished*. And finally, *you will make room in your office and in your psyche for new and better work.*

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