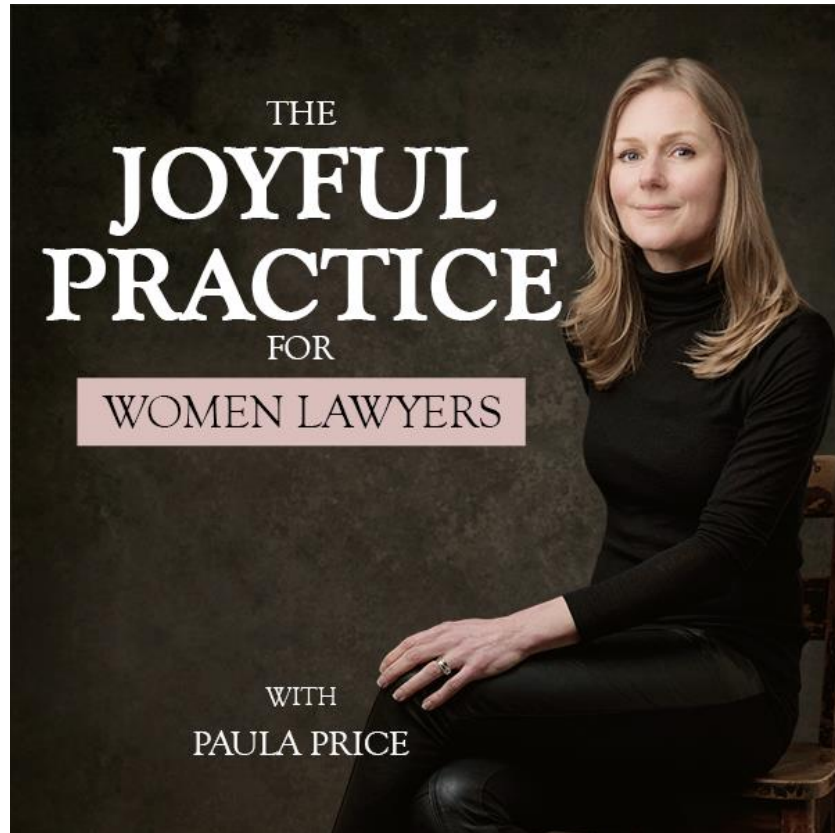


Ep #36: Systems Checklist for Saving Time



Full Episode Transcript

With Your Host

Paula Price

Ep #36: Systems Checklist for Saving Time

You're listening to *The Joyful Practice for Women Lawyers* Podcast episode number 36.

Welcome to *The Joyful Practice for Women Lawyers* Podcast. I'm your host Paula Price, lawyer turned certified executive coach. This podcast was created to empower women lawyers just like you to create a life and practice you love. Join me every week for a break from the hustle so we can focus on you, what you truly want, and how you can create it.

If you're over the overwhelm, done with putting out fires, and ready to create a life and practice that brings you more joy, you're in the right place. Ready for today's episode? Let's dive in.

Hello my friends. Welcome back to the podcast. I hope that you are all doing so well. I hope you're having a fabulous week. I hope you're healthy. I hope your families are healthy. I hope your practices are thriving. January is flying by. I don't know if you feel the same way, but I feel like it's almost done and yet it feels like it just began.

For all of you who are getting back into the swing of things, I hope that you are reconnecting with your work. I hope your years are off to a good start. I just wanted to say thank you for joining me in these podcast episodes. It just is so great to connect.

This week I'm talking to you about system checklists for saving time. The reason that I'm talking about this topic in particular is that time management and practice management are topics that have been coming up quite a bit in coaching conversations that I've been having with clients.

A number of lawyers that I work with find that they're wanting to create systems, sometimes for very different reasons. Sometimes it's a question of overwhelm. Sometimes it's a situation where their practice just feels like it's completely out of control and they just want to find a way to get on top

Ep #36: Systems Checklist for Saving Time

of it. For other lawyers, the systems question is more of a fine tuning. It's a practice that is reasonably well under control, but there are shifts coming or there have been shifts. What they're looking to do is to create better systems so that they can grow more quickly.

So wherever it is that you find yourself, I'm hoping that this podcast episode gives you some ideas for ways that you can enhance your systems. Maybe it's creating new systems. Maybe it's tweaks or adjustments to systems you already have. Maybe it's revisiting those systems. Maybe you set them up a couple of years ago and things have changed in your practice and it's time for a bit of a revamp. So wherever it is that you situate yourself, I hope that you find something in this episode that really resonates with you.

So what I hear from clients and from lawyers generally is that it can be really difficult to stay on top of their practice for a number of reasons. One thing that I hear a lot is that they are dealing with multiple inputs, especially emails. Keeping on top of all those different inputs takes time. It's hard to manage.

Another thing that comes up is a mix of urgent and non-urgent tasks. So among those emails may be a number of requests that are ASAP type real emergency type requests. There's a filing that needs attended to or something's gone wrong on a deal or there's an employment that requires an in the moment type of response. So there's that type of assignment that comes in.

There's also the less urgent assignments that come in that are maybe because of who it is that is asking or there's something about it that feels urgent. So there's a whole mix of inputs and tasks and projects. Doing the triage is part of what takes time and where the systems would be helpful.

A lot of lawyers are dealing with managing expectations. These are expectations from other lawyers. These are expectations from clients that

Ep #36: Systems Checklist for Saving Time

they have. They are trying to find a way to get on top of that. What happens often with lawyers, I mean sometimes these initial practice challenges getting systems set up happen at the outset when you're first starting to practice as a junior lawyer.

It could be you moved to a new firm and you're just getting used to some of the new systems that you're dealing with. Maybe it's a new organization all together. Maybe you've gone from private practice to inhouse or a different type of environment where you're not on the same systems, but you're having to pull yourself up the learning curve. You're looking for opportunities to streamline and create new systems.

What often happens is whether you're starting out or whether you're growing or changing in your role, things can happen that change the way that you work. So your bandwidth might expand. You have new skills. As a result, you're given new projects. Your responsibilities increase. You find yourself with more projects, but you don't find yourself with any more time. In a perfect world, you might want to clone yourself and the clone of you can do half of your workload while you do the other work. We're a long ways off from that tech.

So what ends up being the solution for you might be to do something yourself. You know how to do it the most quickly, the most efficiently, the most accurately. It can be really challenging to delegate that work. Delegating itself is something that takes time. It requires having somebody that you can delegate to. Sometimes it can be really painful to have to explain it, and you may simply say to yourself it's faster for me to do this myself than it is for me to delegate it to somebody else.

Now like I said, I see this challenge of wanting to create systems as something that happens when lawyers are up leveling in their practice. They're moving onto greater things. They become more mature lawyers. They want to move away from some of the tasks that they're doing and

Ep #36: Systems Checklist for Saving Time

push those down to more junior lawyers or push those things down to their support staff. They want to build out those systems to do that.

While we talk about today's topic, I would invite you to think about why it's important for you to get your systems aligned right now. It really doesn't matter when you start. I think the sooner you start, the better. The reason for that is you are going to grow. Your practice is going to grow.

If you think about it in relation to an airplane. I'll use the airplane analogy. I used it last week when I was talking about the four pillars of a joyful practice, and I'm going to come back to that. I talked about an airplane in the context of integrity. Here I invite you to think again about an airplane. In this case imagine, maybe a rocket ship is also a good analogy.

If that airplane is moving really slowly or a rocket that has not yet launched. I mean if the pieces aren't tied super tight together, if it's not perfectly in alignment, it's fine, right. If it's moving really slowly, it might wobble a little bit, but you're not worried about things falling apart at the seams. Whereas if you take that rocket and now you try to launch it and there's a screw loose, things can happen. The consequences can be considerable.

The same thing is true of your practice. It may be fine as you're starting out or where you are in the stage that you're in right now to have systems that aren't all that excellent. That aren't really finely tuned to what you need. Because at the pace that you're going, it doesn't really impact your day to day. But if you want to accelerate, then that's when you're really going to want to have that integrity of systems and that tightness, that streamline, that efficiency so that as you grow, as you expand, you have that solid infrastructure that you can build on. That strong foundation.

So that's one of the reasons I invite you to really think about it regardless of where you are now. There's no need to take my checklist that I'll offer you. There's six items on it. There's no need for you to take it and incorporate

Ep #36: Systems Checklist for Saving Time

everything all at once. I think the best approach is really to pick one thing at a time. Don't overwhelm yourself. Keep at it slowly over time. It is a practice. Like so many things that I talk about on this podcast, it's simply developing the practice. The habits that will support you in your growth.

Now if you find yourself in the situation where you describe your practice as being a total mess. You can't find anything. You're missing appointments. Or if you're in that stage where you're growing and you think, "You know, I really wish I had these systems in place." I just want you to take the pressure off yourself and not think that there's any shortcomings on your part for not having a practice that runs like this well-oiled rocket ship that's about to launch into outer space. It's quite normal not to have these systems. There's a number of really good reasons for that.

Number one, it takes time to know what would even go into a system. An example that comes to mind for me is one that comes from when I used to practice. I used to do a particular type of court application. I would get approvals for plans of arrangement. These were corporate transactions that needed the blessing of the court. The application process itself, it had two separate trips to chambers. The process itself was fairly routine. There were some variations depending on the nature of the transaction, but overall the process was always the same.

I didn't know that going into it. The first time I did it, there was a very steep learning curve. That curve flattened overtime. When I went on my first mat leave, I'd been doing these plans of arrangement for a number of years at that point. I needed to find somebody else in the office who could do these.

So what I ended up doing is I was pre mat leave. So my file load had lightened considerably. I used some of my available time to create a how-to manual. So I had a whole section on each step of the process. I had annotations to case law. There were annotated precedence. There was a chart that had listed every single plan of arrangement transaction that I had

Ep #36: Systems Checklist for Saving Time

ever worked on, the parties involved, where you could find the documents in the system, any unusual features about that particular transaction.

So I was able to build up this comprehensive how-to book that ended up being really useful because I was able to hand it off to other lawyers who could then pick up. They didn't need to know anything about this type of transaction or this type of court application before doing it. Everything that they really needed to know was right there. Whatever nuances that came up they could then deal with.

So this is an example of a system that I wouldn't have been able to put together at the very beginning. After I had done, I don't know, a dozen of these types of transactions, I was very well positioned to be able to write that manual in an efficient way and to know what to include and what not to include.

So in your case, there may be systems that you would like to develop but you're not quite there yet. There may be systems that you are perfectly positioned to prepare now that you would not have been prepared to do a few years ago. So that's number one of the reasons that you may not have systems. It's that you just didn't have the background knowledge, you just didn't have the experience to really create one of these resources in a very efficient way.

So another reason why you might find yourself in this situation is that things kind of build up overtime. So if you think about your hall closet in your home. I don't know about yours, but ours every couple of years I really just need to empty it and deal with what's inside. Your desk might be like that. If I look at my desk right now, there's a few piles that are starting to form. If I don't keep on top of it then those piles, they kind of stagnate. The same may be true for you.

Ep #36: Systems Checklist for Saving Time

So it may be that in your practice, the reason why you're not creating your systems or the reason why maybe you feel like your systems aren't ideal is that you're finding yourself loaded down with some clutter. Maybe there's some remnants of old files that are still on your desk or in your in tray. If you were to get rid of those, if you were to declutter them, then they wouldn't be occupying your space. So that could be another reason why your systems aren't totally up to snuff is that things have been happening, and you just haven't really been able to carve out the time or even notice that it's become a problem.

The third is that things move quickly in your practice. So in your day to day, you are dealing with things that are happening in the moment. They are quite likely urgent and important. If we talk about Stephen Covey and his four quadrants, there's urgent and important. There's urgent and not important. There's not urgent and important. There's not urgent and not important. So there's these four different categories that tasks can fall into.

If you find that you are always focused on the urgent tasks then you may not get to the ones that are not urgent. Planning and creating systems, I think often fall into that not urgent but important category. So if your practice is busy then this can be the reason why you haven't had the chance or the opportunity to really create those systems.

What ends up happening for a lot of lawyers is that they think that they want to have a system. They know they'd like to have a system. But when it actually comes down to making those systems, they never really find the time. It can feel like when you do have the time, you look at what needs to be done and it can feel completely overwhelming like there's too much to do. It can also feel like the energy that would be required to start out is just too much.

So you can think about that rocket ship that's about to launch itself. It takes a lot of fuel for a rocket to actually get off the ground. It's no different when

Ep #36: Systems Checklist for Saving Time

it comes to creating systems. Especially if you think about something like delegation where you're really going to be needing to learn the skill of delegation.

You're going to be needing to learn how to train people to do the things that would be helpful to you. Initially it probably isn't going to be as helpful to you. Training somebody is going to take time. It's going to take energy. It's going to take effort. It's that initial energy requirement. If you can get past it, then of course you have a better system in place.

It can also be that you may schedule time for yourself to sit down and create these systems. You get to that calendar appointment in your schedule and you sit down to do it, and it just feels so heavy. It feels not very exciting.

And this has happened to me before where I've sat down to do a task like that. Then it's like this "urgent" project comes in through your email, and it's like a blessing. You think, "Okay, well here's a fire that I have to put out." Maybe it's not a fire that you particularly want to put out, but it's so much better than having to sit at your desk and plow through the tedious task of creating a checklist.

So I get it. This happens. There's lots of reasons why the systems don't get done. Unfortunately even though it's totally common, even though it's a natural reflex, when the systems aren't there and they keep getting pushed to the bottom of the list, what ends up happening is the work starts to really pile up. It can take you longer to do things. Maybe you're having trouble finding things, maybe you're having trouble figuring out even what's on your calendar.

You might be trying to do everything yourself. So your workload is becoming increasingly large. You don't create systems to manage these things, to organize them. You may start missing things like appointments.

Ep #36: Systems Checklist for Saving Time

Then you then have to backtrack and it's embarrassing. You start feeling badly about yourself. You may feel like your time is unmanaged. There might be a really unsettled feeling for you if you find that your practice really isn't running very smoothly, that you don't really have the systems that you want to have in place.

You may feel that you're isolated. That you don't have anybody that you can rely on to help you in your practice. Delegating, as we talked about, can take longer than the amount of time that it would save. So you don't do it. You might end up spending more and more time working with less and less to show for it. That's when some lawyers really start fantasizing in their plan b.

That looks different for different lawyers, but sometimes it's opening that pastry shop somewhere in the south of France and just leaving your practice all together. If you're at that point, you're not alone. I talk to lawyers who have different varieties of this plan b fantasy. Wouldn't it be amazing if we could simply go back to your practice and find a way to organize it so that you are enjoying it a lot more.

So what I'm going to do today is offer you a number of checklist items that you can consider for streamlining the way that you practice. These are time saving strategies. So I'll go through them. I'll summarize them again at the end. Hopefully, some of these resonate with you. As you listen, I invite you to think about what is most applicable to you in your practice with a view to taking one suggestion that comes out of this and applying that this week in your practice.

So number one is to check in on your health. Now you may be thinking, "Okay, what does this have to do with my practice?" I know when I was a lawyer and we had people come to speak to us at law firms, I always kind of had one of those inner eye rolls when I was talked to about or when people talked about getting enough sleep and are you looking after

Ep #36: Systems Checklist for Saving Time

yourself. Now I say that, but the reality is it is so important. If you are trying to operate your law practice on two hours of sleep at night, then you know the difference between what that looks like and when you're fully rested.

So there are two areas of your health that I really encourage you to consider. Number one is how you're feeling physically. Your sleep is a big component of it. When your practice is organized, you probably literally will sleep better at night.

How many times have you had that experience where you're fast asleep and at two o'clock in the morning you wake up suddenly and you have on your mind something that happened on a file? Maybe it's the fear that you have missed or are running up very closely to a limitation period. Maybe it's did I file something? Is it something that happened on a deal that you're working on?

This happens. My guess is that when your practice is out of order, this kind of sleep trouble is going to be more prevalent than when you are on top of your systems, when you are confident that you know what's going on. So sleep is one of these things that works both ways. The more sleep you get, the better you're going to perform at work. The better you perform at work, the better your sleep is going to be. So these are things that reinforce each other.

I also encourage you to think about your health and your nutrition. I talked last week about brain health a little bit and how a number of the things that we do to support our physical health generally also support our brain health. So you want to be thinking about that. Are you drinking enough water? Are you getting enough Omega-3 fatty acids? Are you giving yourself downtime? Are you spending time with friends and family? Are you eating a proper balanced diet? Are you exercising?

Ep #36: Systems Checklist for Saving Time

So there's all these different components that go into your physical health. I would encourage you to ask yourself whether or not your health practices are supporting you in your practice or if they're taking away from it.

The other side of your health, of course, is your mental health. I think as lawyers we know as a profession that this is a serious topic. That there are a number of challenges that can come up. There are lawyers who really suffer from stress and anxiety and substance abuse as well. So if any of these categories apply to you, then I would encourage you to really take a look at that and think about getting the professional support that you would need. Likely a counselor or a therapist. That, of course, depends on what it is that you're looking at, that your dealing with.

That your mental health is essential to running a proper practice. Those two can go hand in hand as well. If you find that your practice is out of sorts, that may further exacerbate the stress that you're experiencing. The two then feed into each other.

Another topic I want to allude to here in the category of mental health is being on top of where you situate yourself in relation to ADD or ADHD. I bring this up because I've worked with a number of lawyers and I've spoken with a number of lawyers, not necessarily clients, who have ADD or ADHD. Many of whom who were undiagnosed or are undiagnosed very late into their lives. By very late I mean 30s or 40s.

For some people, the diagnosis comes because they have children, and they're children are struggling in school. The children go in, they get a diagnosis, and the parents then are also diagnosed. They realize that a lot of the symptoms that are associated with ADD or ADHD are things that they struggle with as well.

So some things that come to mind are procrastination. If you find it really hard to actually sit down and execute on a task, that can be a sign. If you

Ep #36: Systems Checklist for Saving Time

find that you are chronically disorganized, that you're often late, that you forget appointments, that you lose things. That can also be a sign. If you're easily distracted, that can also be a sign.

Now with things like ADD/ADHD, these are symptoms that are prevalent or common among pretty much everybody in the population. We all have times when we procrastinate. But when you have ADD or ADHD, it's pushed to a higher level. So if this sounds like something that resonates with you, you may want to check that out. Have it investigated because if you do suffer from ADD or ADHD.

I say suffer, but as I say that I also want to point out that with ADD or ADHD, sometimes you also have an enormous creativity. So I think it's almost there's this wonderful blessing that can come along with it. This creativity, this deep intellect. A huge capacity to perform and attention to detail. There's all sorts of characteristics that come. They're not all negative is what I'm really trying to say.

If that is something that you experience, there are tools. There are drugs. Again, I'm absolutely not qualified to weigh in on that at all. But there are systems that will help manage ADD and ADHD in terms of time management strategies, productivity strategies that are as relevant to neurotypical individuals as those who call somewhere else on that spectrum of neurodiversity.

So what I would encourage you to do under that rubric of mental health is to ask yourself if this is something that might apply to you because what can happen is that if you are really smart, and I suspect you fall into that category. If you're really smart and you don't exhibit some of the traditional behaviors that are associated with ADD, maybe that's sort of being disruptive in class, not being able to sit still. You may not have those characteristics because of the nature of your personality or your social conditioning.

Ep #36: Systems Checklist for Saving Time

So you can go through a long stage of your life without ever knowing that this is a thing. You can really take it on your shoulders and feel badly about yourself about things that are really outside of your control. So I did take a little bit more time than I anticipated on that topic, but I think it's so important. I just want anybody who resonates with that to know that there are options for you.

So that was number one is to check in on your health. Check in on your physical health, your mental health. That, believe it or not, is going to save you time in the long run.

Number two is to set goals. Now the reason it's important to set goals is that when you're creating systems it can be somewhat anticlimactic or difficult to adhere to systems that don't really serve a purpose that you believe in. So before you start setting up systems, I would invite you to take a step back and think about what it is that you want from your practice. How you want to serve. How you want to show up. What kind of lawyer do you want to be?

My guess is you want to be somebody that your clients can trust, somebody who follows through on commitments. Somebody who is there when they say they're going to be there. So having systems in place that allow you to do that all feed towards that greater goal. For goal setting, I would encourage you to check out my podcast episode. I believe it's episode number six where I talk about setting great goals. You can use that framework to set goals for your practice.

I also wanted to refer to last week's podcast episode where I talk about the four pillars of a joyful practice. Those four pillars are really the foundation of a joyful practice as I have witnessed it in the work that I do with lawyers. Those pillars are mindset, they are alignment, process, and growth. Today's podcast episode really is about process. I'm giving you tips, the how-to. But they are very much intertwined with the growth because these

Ep #36: Systems Checklist for Saving Time

systems really will help you grow, and alignment. Doing that work in alignment with how you want to do it.

So I invite you to go back to that podcast episode to see how all these different pieces really fit together to create a sustainable practice for you that you enjoy. So number two is set goals.

Number three is to create routines in your practice. So for anybody out there who has ever been around a toddler, you will appreciate that routines are a life saver. I think that I have always enjoyed routines, but I didn't really fall in love with them until I became a parent and realized how routines really reinforce security and predictability and a steady flow to your day.

There are a few categories of routines that I'm going to talk about here. I'd invite you to think about which of these routines and what other routines would really help you in your practice. So the first routine is around time management. I've done a number of podcasts where I talk about time management. I would refer you to episode number two where I offer I think it's eight strategies for lawyers if you want to go more in depth on some of the how to's when it comes to time management.

One of the things that's really key for time management is routine. That means creating a practice out of the way that you manage your time. So what are you doing every day and every week and every month to manage your practice? Every day I recommend having a practice in the morning where you review what's happening, what's on your desk that day, what are you going to be doing, how do you want to structure your work in a way that is most efficient.

At the end of your day, I would encourage you to do a wrap up for you to review the work that you did that day, to write down anything that you need to carry over to the following day. Writing it down will help you be organized

Ep #36: Systems Checklist for Saving Time

when you arrive at the office the next morning or if you're working from home when you go to your work space the following morning. It will also give you peace of mind. When you write those things down, you no longer have to manage them inside your mind when you leave your office or your virtual office. It's a wonderful practice to get into.

As you are planning your days, I would encourage you to see what routines are already in your day and to plan around them. I refer to these as anchors. It's not a term that I made up myself, although I wish that I had because it's a really excellent way to describe how you can use events in your day to structure your time. So what are some common anchors? When you wake up, that's something that happens every day. When you go to sleep, that happens every day.

During my work day, my anchors are typically getting back from when I drop off the kids. That's the start of my work day. I actually start my work before I take the kids to school. So really it's waking up. I have a morning practice of writing in my journal. I exercise. I write in my journal. I set up my schedule for the day. I might do some work. Have the kids have breakfast, take them to school, and then I settle back in after I drop them off. So that's usually around nine.

At noon I then have a lunch break. So I always have that to look forward to unless I've got a webinar that I'm doing at noon or something to that effect. Then I might have a walk in the afternoon. Then I will typically pick up my children somewhere between four and 5:30. I mean that's kind of the way that my workday operates.

So with everyday these are anchors. Your anchors will look different from my anchors. If you think about what happens in a typical workday for you and you identify what those anchors are then you can start using those anchors strategically for project planning and for work planning.

Ep #36: Systems Checklist for Saving Time

So if you know you have about a two hour window where you can really focus on something. Maybe it's drafting a contract or writing an argument and you just want that really intense focus time, you might give that the 10:00 to 12:00 window. Anyhow, the point here is to look for routines in your day and to use those routines to plan your practice.

Another thing to plan around, of course, is energy. I talk about this in episode number two. You may have already heard of this concept. I've talked it on the podcast before. The idea that everybody has a different programming when it comes to when you have your best energy.

So if you're a morning person, that's when you're most alert. That's when you have your best ideas. You will want to schedule your heavier thinking tasks in the morning. Maybe you schedule your errands or meetings or things that don't require that same level of intensity, you schedule those things in the afternoon.

If you're the opposite, if you don't start thinking straight until three in the afternoon, then you would want to schedule your heavy thinking work in the afternoon and meetings and errands might go in the morning. So it really depends on who you are and how you best operate. When you start paying attention to your energy levels, it will become more apparent to you how you can go about scheduling your day.

Believe it or not once you start getting into this practice, it might sound like a lot of things to manage in one sitting. Once you start planning around that, it actually becomes really fun. Because then it's almost like a puzzle. You sit down, you look at your workload. You think, "Okay these emails are a little bit routine. I'm going to save those for the end of the day. I'm going to focus on drafting this." For you it might be an argument or a contract or a court application. "I'm going to do that drafting in the morning." Anyhow, those are some ideas on routines.

Ep #36: Systems Checklist for Saving Time

Another place where you might start building in routines are around meetings. So you might start to creating meetings with a team that you work with if that's how you work. If you have an assistant that you work with, you might start building in meetings with your assistant.

One example that comes to mind is a lawyer that I worked with who had a small practice. She was trying to get her team more cohesive. So she started scheduling Monday meetings. Not first thing in the morning, but I think it was something like 10:00 in the morning.

What that meeting did for her team was it developed a sense of the accountability. Everybody knew that the meeting was going to happen on Mondays. Everybody would come prepared to talk about their files on Mondays, which means that everybody would have to be up to date on their files. If there were any issues that they wanted to raise, they had that opportunity to talk about it at the meeting. If there were big projects coming up, they could talk about that. If there were court applications coming up, they could make sure everybody knew what they were responsible for.

So having that practice not only builds collegiality among a team, but it also develops a practice so that everybody now knows okay, we're having this meeting. It also helps you know what doesn't belong in a meeting. So if you're working on a project and you realized there is an issue that is bigger than something that you could deal with at that meeting, then you might schedule it outside of the meeting. Just having that meeting on your mind gives that sense of flow and accountability.

So some of the things that you might want to put in a meeting. Sorry, I should mention also for a number of lawyers, scheduling regular meetings with their assistant is also really helpful. Because, again, it allows them to have that ongoing accountability. Their assistants can help them manage their work days. They can help with any scheduling issues that come up,

Ep #36: Systems Checklist for Saving Time

any additional support that they might need. Having that regular conversation might be really helpful for some lawyers.

When I had an assistant, I didn't really need to do that regular checking in. It was really never something that I needed in my practice, but I was quite conversant. As I'm thinking about it out loud, I did have my assistant who would come to me and check in and see if I needed anything. If it's something that would really help you add structure to your day, I would encourage you to do that.

Things that you can talk about or systems that you might have to support those meetings is a file list. You might have a list of the active files you have going on. I'm going to talk about this again, but that might be a subject for discussion at these meetings. It may be that you talk about court hearings that are coming up. It might be, again, projects for the week and delegating tasks. Making sure that everything is ready. Any updates that you have or need to communicate.

These meetings also serve the purpose of making yourself accessible to people who may see you running around busy in your practice and think that you're too busy for them. If they know that they've got that designated time with you, then they can start to talk to you in that context.

What you might find is that there are fewer things missed. There are fewer mistakes. Because if there's a lack of communication because people don't think that's an option for them and they try to solve things without your input and it doesn't quite go the way it should go, there's an opportunity to avoid that by simply having a conversation.

Other areas where you may find that there are routines. So we've talked about your time. We've talked about scheduling meetings. Cycles. So if there's a billing cycle then you might develop a routine around the billing cycle or file audits. I worked at a firm where there were quarterly file audits.

Ep #36: Systems Checklist for Saving Time

Yes, we all kind of -- What's the right word? It's not groped. We all sort of grumbled a little bit I suppose when it was time to do the file audits because it was this other thing that we had to do. But what a great way to stay accountable and stay on top of all of our files. So that might be something that appeals to you as well.

Finally non work routines are probably, I want to say they're just as important. I'm not sure that they're just as important in the context of your practice, but they are certainly as important in terms of the overall quality of your life. So look for places in your life where you can add routines. I'm a big fan of this. So at home, what are some systems that are going to be helpful for you?

Whether it's meal planning, again, I've got a family. I didn't use to meal plan. I never had to. But now that I have a family, I want to make sure there's healthy food on the table. So every week I do the meal plan. My family will report to you that the meal plan doesn't change very much from week to week, but I know what's going to be happening most days in advance.

Having routine mornings is really helpful. Having routine clothes even that you wear. I mean I always think of Mark Zuckerberg and the t-shirt, right. It's a white t-shirt. Something simple so that you're not having to constantly think about it.

The reason that these systems are so helpful is that number one, they save time. Number two, they reduce decision fatigue. The fewer decisions that you're making on things that you can simply make a routine the better. Then I would also encourage you to have health routines. So whatever that looks like for you whether it's having your exercise routine, your nutrition plan, whatever that looks like. The more you can automate that, the better.

Ep #36: Systems Checklist for Saving Time

So we're now at number four. This is probably more what you were expecting, or maybe not. Not sure. Here I would encourage you to create process checklists. Process checklists are checklists that you can make for things that you do repeatedly. So this is a little bit different from routine. Routine to me is more what's happening on a daily basis, on a weekly basis, or some regular occurrence in time. A process checklist is here's this thing, and I know that these steps will need to happen so I'm going to create a checklist for it. So what might that look like?

With lawyers I've worked with, one of the things that comes up is intake calls, right. If you are currently responsible for all the intake calls, that might be something that you can delegate. You may want to create a script for whoever it is that's going to take over that role. The steps in a file. So it may be that you have a practice where there are routine steps. Maybe it's a personal injury file where there's going to be a sequence of events that will always be the same. You can create a checklist for that that you can use internally on your files.

I mentioned the court applications that I was doing. Maybe you do a certain type of court application repeatedly, and, again, it lends itself to a checklist or a how-to guide. Legal research. I used to do a lot of research, and I created a legal research guide that had the steps that you could take. There was a list of resources for each different subject area. So maybe there's a checklist that you can create in that respect.

Preparing for examinations for discovery or depositions. Maybe there's a checklist that you follow when you prepare your witnesses. Maybe you're a solicitor and you work on transactions where there are certain checklists that you need to follow for every type of transaction.

There's checklists, and again, I invite you to think about how these apply in your practice. Checklists are great. They increase efficiency. If you have a checklist, you can simply follow the checklist. You don't have to reinvent

Ep #36: Systems Checklist for Saving Time

the wheel every time. You don't miss things because you now know all the different items that you're looking for in relation to a specific task that you're doing.

You can delegate more easily. Like I said with the protocol that I created for plans of arrangement, it became very easy to delegate. Because I didn't even have to really talk about the process. I could say here's the road map, and if you have questions come back to me. That worked very well. You will probably find the same thing. That frees up your time and it allows you to build a team.

So now when the next project comes in, you've already explained to somebody how to do this. They already have that experience. It becomes so much easier to then delegate. You also create institutional knowledge and everybody loves that. The more resources that you create that other people can lean on, the more value you're contributing to the overall operation of your organization.

It also allows you to create building blocks for your practice. So again going back to that original goal and wanting your practice to be a certain way. What are some of the key areas you want to be focusing on and what are some of the key areas that you don't necessarily want to be doing yourself but that you would like to oversee others in doing. Right?

So maybe you don't want to be taking all the intake calls for the wills and estates clients. I'm making this obviously. But you want to be able to oversee that process. So you want to have a script that you give to somebody. They make the call, they report back to you, etcetera. It could also be that there are practices or systems that you want that will enhance your practice of course.

When it comes to building these systems and checklists, you do not always need to start from scratch. So when I practiced and I'm sure it's still the

Ep #36: Systems Checklist for Saving Time

case, there were practice manuals that you could consult that would have existing checklists. So maybe it was what to do when you go to the court of appeal. Or what to do when you have a claim against a debtor.

So there maybe existing practice checklists that you can use to either simply use that as your checklist. Maybe it has everything you need already. Or maybe you can take that practice checklist and enhance it, adapt it to match more closely what you do in your practice.

So if you are going to create a checklist and you think there might be one that is already out there, start with that. Make your job simpler. Even start with that and you can ask somebody else if they can take a first crack at what they think that checklist would look like. So there's ways of delegating or sharing the load when it comes to creating these checklists.

So there are two more. The next one is to centralize information. So when it comes to time management, one way that you may already be centralizing your time is with your calendar. So for you to have all your appointments in one place, great. For you to be able to share that with your assistant or other members of your team, great. The more you all have access to the same information, the better. Especially with your calendar if you find that somewhere where you really need that input or you need other people to see what you're doing so that they're not double booking you.

Another area where you might want to centralize information is your file list. So we talked earlier about meeting with your assistant to talk about the files that you have on your active file list. Have a document where you can add to that, your assistant can go in. You have a very, it's almost like a cheat sheet or a quick way of checking up on what you need to do for a particular file.

So clients I've worked with have had all different types of file lists and different ways or signaling to themselves what's urgent, what needs to be

Ep #36: Systems Checklist for Saving Time

done, what key dates are, whether they're reported recently, etcetera. So think about what your practice looks like, what you would want to have on a file list. Then go ahead and either create that document or have someone else create it. You can use that to support yourself in your practice.

Other things you might want to centralize is your contacts list. So this might be experts that you're working with. It might be your clients. It might be counsel on the other side of the file. Make it easy for whoever is working with you to find the people that they need to contact on your behalf. It may be that you also want to collect frequently used resources.

So if you happen to refer to a source frequently then have that handy. If there are websites that you go to frequently, have those bookmarked. Whatever that looks like for you, you're going to want to centralize those resources. Maybe it means saving them in a particular file folder within your organization. Maybe it means they are kept in a particular location. Again, it really depends on your practice.

Finally precedents. Chances are you've got a precedent system. You might think about whether it's working for you. If you're at a large firm, my guess is there is potentially a whole department that is devoted to maintaining and keeping up precedents. If you have your work precedents, you might think about how you want to organize the ones that you work with most frequently. Those, of course, will help you in your practice.

So finally and kudos to you for hanging in there. I'm realizing as I'm recording this episode that it really is a lot of information. So I appreciate you paying attention and thinking about how these systems can help you. The last one I want to talk about, number six, is to create progress goals. This is an exercise that I do with my clients, particular the ones who have time management or practice goals that they are working towards.

Ep #36: Systems Checklist for Saving Time

What this looks like, it looks different for each client, is to create a list of competencies. Then I ask my clients to rate themselves on each of those competencies. So what does that mean? What are the competencies that we might measure for? One of them might be communicating instructions.

So it might be are you figuring out what you need ahead of time? Are you clear in making sure that the person you're delegating to understand what you're looking for? Are you inviting them to follow up? Are you checking up with them? How are you delivering feedback after the project has been completed and you've reviewed the work?

Other areas where you might be setting up competencies might be around setting up boundaries. So maybe you need to be saying no more. Maybe you need to have an intake process where you're triaging the things that you allow to come across your desk.

It may be that your competency is around scheduling and calendaring. It involves I sit down every morning and I look at my schedule. I have an appointment with myself every week, and I set my schedule for the week. I know what's happening at any given time on each of my files. These are all competencies that you can have in whatever that document might look like. Maybe it's a spreadsheet for you. Maybe it's a checklist.

What I'm inviting you to consider here is thinking about what are all the competencies that you would need to be exercising in order to have the systems that you want? The last one in my notes here is renegotiating deadlines. So that might look like I have conversations as soon as I see on a file that there is a potential for not meeting a deadline. I have a conversation with one of the parties involved or whoever I need to talk to either renegotiate the deadline or reassessing the work or get an extension. Whatever that looks like.

Ep #36: Systems Checklist for Saving Time

So this is a practice that I think will really help anybody who is looking to make progress. So if you have any questions about what that would look like, you're obviously welcome to send me a note. I'd be delighted to chat more about that.

So in summary, I shared six checklist items to help you save time. Number one is get on top of your health, your physical health, and your mental health. Number two is goals. So know what it is that you're trying to accomplish in your practice. Number three is routines. Look at where things happen frequently or repeatedly and figure out how you're going to work with those routines to save time and enhance how you schedule your time.

Number four is process checklists. So what things in your practice, what tasks can lend themselves to these itemized checklists or how to manuals? Then create those and use those to delegate and teach others and build up your team.

Number five, centralized information. So make sure that other people have access to your calendar if they need that. Figure out how you're going to create a master client list that others can check in on if they need to and those types of centralized information systems. Then finally create progress goals. So this is really a system that is for your benefit so that you can track your progress.

So if we look at these different items that I've suggested here and you look at them in relation to last week's episode where I talked about the four pillars, you will see this really is a process topic. But it's very much in harmony with aligning yourself with how you want to practice and working towards your goals.

The mindset piece is here to, more in the exercise of building. So going at this exercise with a growth mindset where you don't need to be perfect right away. You don't need to ever be perfect frankly, but to give yourself the

Ep #36: Systems Checklist for Saving Time

grace of working towards developing these practices as opposed to beating yourself up because you don't have them up.

So why will it work when you implement these practices? It will work because what's going to happen is you bring in all four of these different elements of your practice. They support you in creating these systems. As you work with these systems, your practice will become easier. Easier in the sense there's less difficulty. There's less nervousness or stress that you're missing things. You'll feel more confident.

The skills that you'll need to implement these processes are number one, you will need the discipline to sit down and create the systems. That's probably the hardest part is simply to carve out the time. Like I said, this is important, but likely not urgent. So the biggest part will just be sitting down and identifying what practices you do want to implement. Look at the list, think of your practice, identify all the things that would be helpful to you, and then pick one. Just one and start with that.

Another thing you'll need is the belief that your hard work will pay off. Finally the patience to keep trying even when the system may not work perfectly on the first try. So yes you can create a system, but it's a work in progress. You'll need to keep working at it.

The results that you'll create, as I mentioned, you'll have a much more organized practice. You will ultimately save time because you're not losing things. You're not looking for things. You're not missing appointments. You're not reinventing the wheel. You will be able to delegate more easily and you will have built a team of others who can support you, to whom you can delegate things. As you delegate certain things off your desk, that frees you up to use your time and your energy to grow into the areas that you most want to grow into.

Ep #36: Systems Checklist for Saving Time

So my friends, this concludes today's podcast episode. Thank you, again, for joining me. I hope you have enjoyed talking about systems. It is one of the topics that I love coaching lawyers on. If you have any questions about it, absolutely reach out to me. You can find me on LinkedIn. You can email me. If you would like to work with me, then absolutely reach out. Happy to have a chat with you and see if you would enjoy that, if you would find it helpful.

For anybody who's listening, I would encourage you, invite you to share this podcast with anybody that you think would find it helpful. Anybody that you know is maybe struggling a little bit with getting on top of their practice. Absolutely share this episode with them. If you would take the time to rate and review this podcast, I would be so grateful. You're doing that would be extraordinarily helpful in allowing me to share this podcast with others who, like you, would enjoy and benefit from what we're talking about here.

So hope you all are having a beautiful week. I hope you have a beautiful week. I very much look forward to connecting with you next time. Bye for now.

If you enjoyed today's show and don't want to miss an episode, subscribe, and follow the show wherever you listen to your podcasts. If you haven't already, please leave a rating and review. Your feedback will help me create a podcast that's tailored to your needs and goes straight to the heart of what matters to you. For instructions on how to subscribe, rate, and review the podcast, visit www.thejoyfulpractice.com/podcastlaunch. See you next time.

Thank you for listening to this episode of *The Joyful Practice for Women Lawyers* podcast. If you want more information, visit www.thejoyfulpractice.com. See you next week.