

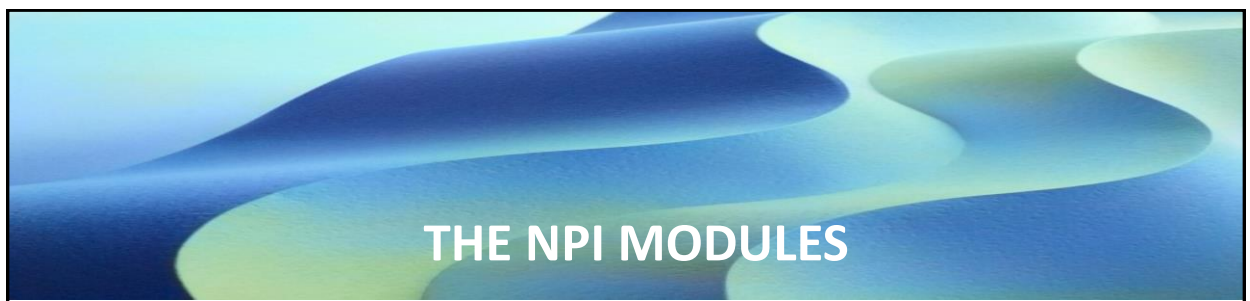


# New Partner Institute

Business of Law and Business Development Program  
for SCG Legal Member Firms


scglegal.com

1



## THE NPI MODULES

- INTRODUCTIONS & BUILDING A STRONG FOUNDATION
- PRACTICE MANAGEMENT & PROCESS IMPROVEMENT
- LEADERSHIP
- PLANNING FOR SUCCESS



2

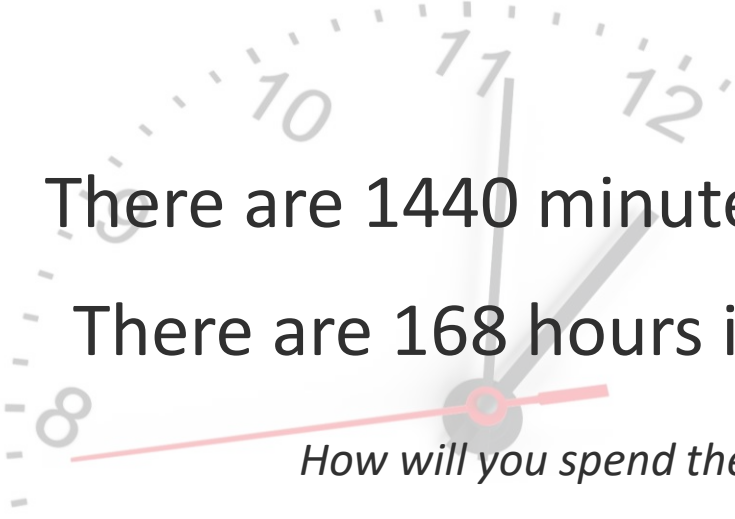
# Planning for Success



3



4



There are 1440 minutes in a day.  
There are 168 hours in a week.  
*How will you spend them?*

**FIRM**  
Guidance

$24 \times 7 = 168$

5

*"Planning is essential. Plans are useless."*

-Winston Churchill

**FIRM**  
Guidance

6

## Plan the work, work the plan...

### ATTORNEY BUSINESS AND MARKETING PLAN TEMPLATE

*For the first draft, please do not spend time overthinking or wordsmithing. Rather, capture your initial ideas in bullet point fashion. Completing each section is NOT required. In your coaching sessions, we will discuss and refine your initial ideas. The point of planning is not to create a beautiful document – it is to develop a roadmap of specific, measurable, actionable, and time specific strategies and tactics.*

ATTORNEY NAME:

#### EXTERNAL/MARKETING ACTIVITIES

##### A. Review

1. Describe significant marketing activities you participated in over the last 12 months (speaking and writing, trade professional and business organizations and seminars).
2. List your most notable cases/transactions/matters from the last 12 months that had marketing or client development significance.

##### B. Indicate activities that you will personally undertake to accomplish in the coming months in the following categories:

1. Memberships: I will become an active member in:
  - i. Bar Association Sections
  - ii. Civic or Professional Organizations

2. Leadership: I will work towards serving in a leadership position in the following:

Association/Organization	Position Desired Attained	Target Date

3. Seminars and Presentations: I will participate in the planning of the following FIRM or outside sponsored seminar, as a primary or panel speaker:

Seminar Topic	Target Audience	Target Date

4. Articles: I will prepare the following articles as a primary or co-author:

Topic	Target Audience	Target Date

5. Professional and Personal Development: I will undertake the following activities to help me develop my personal skills and level of professionalism:

- i. CLEs, courses, films or tapes:
- ii. Teaching or lecturing opportunities:
- iii. Other:

#### BUSINESS DEVELOPMENT ACTIVITIES

##### A. Review

1. Describe how you obtained additional business from existing clients over the last 12 months. Identify significant clients and the types of work generated.
2. Evaluate your business development strengths and weaknesses for you or the firm to address (e.g., providing additional training).

##### B. Client Development and Retention.

1. Identify existing clients whom you will regularly entertain by way of lunches, dinners, etc.

Company Name	Contact
1.	
2.	



7

## Create SMART goals



**Specific:** Precise statement of what needs to be accomplished: exactly what are you going do, how much? When? How often?



**Measurable:** Concrete criteria for gauging progress. Helps you manage and evaluate your goal.



**Attainable:** Assurance your goal fits your ability. Something you can accomplish. Not too easy or too hard



**Relevant:** Personalization of your goal. Supports your interests, values, needs and talents. Critical to motivation.



**Timed:** Beginning point and deadlines. Gets your started and keeps you on track.



8

## The HABU - Highest and Best Use

FOLLOW THE 7 STEPS TO ACHIEVING YOUR  
HIGHEST AND BEST USE (HABU) IN YOUR PLANNING TEMPLATE

1. Seek input from others
2. Distill to exactly 6 words
3. Share your HABU with others
4. Make sure you are doing things that are at your HIGHEST AND BEST USE!



9

## The Heart of Your Plan

Taking into consideration your HABU, responsibilities and the priorities of the firm, identify up to two outcomes and corresponding activities to which you will commit.

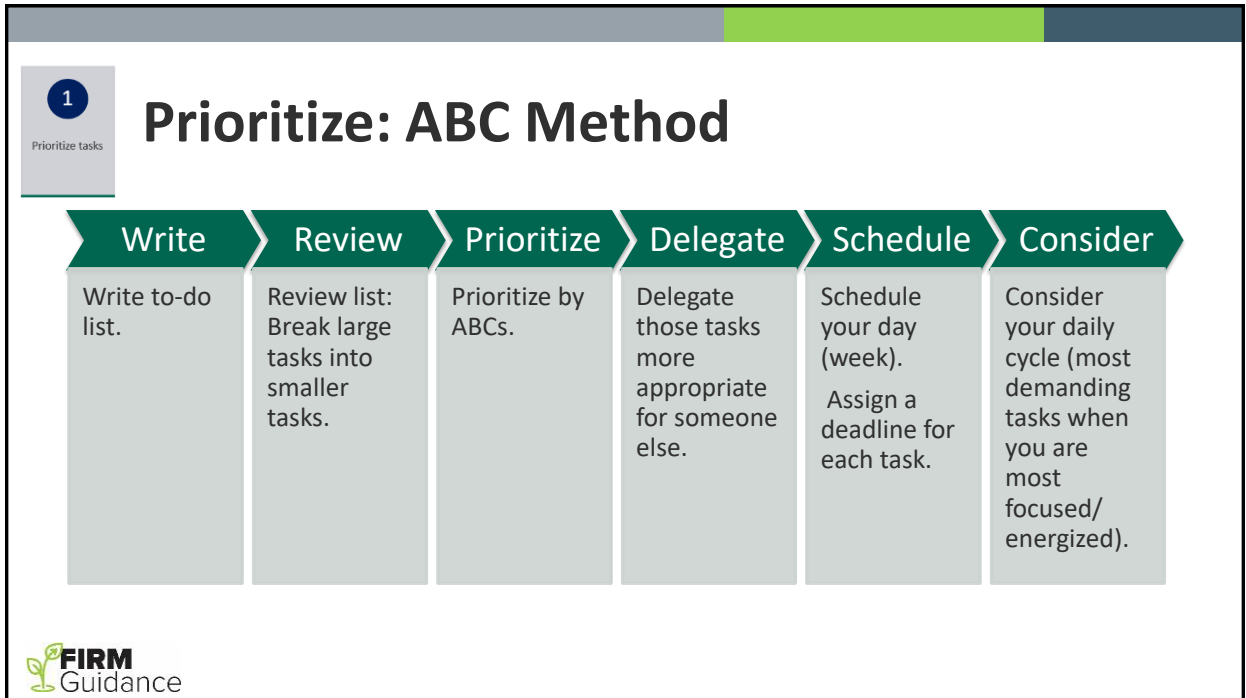
OUTCOME  
ACTIVITY  
QUARTER

OUTCOME  
ACTIVITY  
QUARTER



10






13

## A Priorities – LIMITED

- Urgent AND important
- Support a long-term goal
- Support others you work with
- Ask: What terrible thing would happen if I didn't do this today?
- Only top priorities get A category

 FIRM Guidance

14

## B Priorities

- Important but not urgent
- Mild consequences for not doing this (some may be unhappy or inconvenienced)
- Time (waiting period) usually elevates to A or drops to C
- Never do a B task when there is an A task that needs to be finished



15

## C Priorities

- Not important or urgent
  - Sometimes are not important but are urgent
- No consequences for not doing this
- Nice to do



16



# Prioritization Grids

## Eisenhower Matrix

	Urgent	Not urgent
Important	<b>A tasks</b> Do these tasks immediately	<b>B tasks</b> Schedule these tasks
Not important	<b>C tasks</b> Delegate these tasks	<b>D tasks</b> Eliminate these tasks

	URGENT	NOT URGENT
Important	<b>A</b> Deadline Critical client meeting tomorrow Scheduled at work	<b>B</b> Memo due in two weeks Planning Some calls or requests
	Pick child up at daycare	Rejuvenation time
Not important	<b>C</b> Interruptions Disruptions Some calls	<b>C</b> Trivia Busy work Time wasters
	Friend asks favor	Facebook



17

2

Get organized

## Organizing: The to-do list

- Helps you prioritize
- Helps you overcome procrastination
- It's a critical starting point - not a stand-alone tool



18

## Organizing: schedules

- Get the big picture (semester, work cycle, vacations)
- Know your schedule (weekly calendar)
- Determine how much time it takes to complete various tasks (double your estimates)
- Plan a balanced schedule (fixed and flexible tasks)
- Identify odd hours and small bits of time – plan how you can use them
- Schedule time for prioritizing
- Schedule breaks and time for rejuvenation
- Enter all this somewhere (paper, outlook, app)



19

3

Overcome procrastination

## Overcoming procrastination

- Recognize that you are procrastinating
- Evaluate and diagnose your procrastination: reasons, what parts of the task
- Counter-measures:
  - Use to-do list
  - Break large tasks into smaller parts
  - Schedule specific times to do things you are mostly likely to put off
  - Address reasons (eg don't like the task, hard to start, fear of failure)
  - Reward yourself for starting and finishing



20

## More procrastination busting tips

- Create the Right Environment
- Set Up the Task
- Post Your Deadlines
- Do the Fun Stuff First
- Start Somewhere, Start Anywhere
- Beware of Multitasking
- Know That You Can't Do Everything Perfectly!
  
- From ADDitude magazine - **The Procrastinator's Guide to Getting Things Done**
- [http://www.additudemag.com/slideshow/99/slide1.html?utm\\_source=eletter&utm\\_medium=email&utm\\_campaign=August](http://www.additudemag.com/slideshow/99/slide1.html?utm_source=eletter&utm_medium=email&utm_campaign=August)



21

4

Let go of  
perfectionism

## Perfectionism



- Be aware of your tendencies
- Take an honest look at how you spend your time
- Analyze & reframe your self-talk
- Focus on the big picture
- Ask “what’s really needed in this situation?”
  - Is perfection necessary or even better?
- Maintain high but attainable standards
- Be realistic about what you can accomplish
- Seek help when needed
- Don’t throw work away – replant it



22

5

Manage  
disruptions

## Managing disruptions



- Disruptions are often urgent (at least in the mind of the person presenting them) but not important
- Identify recurring interruptions and distractions
  - Keep a log
- Learn to say no: Be polite but assertive
- Other tips: Establish available/not available hours, turn off notifications; use Outlook to identify uninterrupted time
- Set limits with necessary interruptions
  - I have five minutes, I can do this tomorrow

23

## More disruption diffusing tips

- Remind yourself: Your Availability ≠ Your Importance
- Develop phrases that deflect the “Got a minute?” intrusion to a later time
- Use “modified” open door policy
- Consider working in another location sometimes
- Configure your office so your desk faces the door
- Stand up on the entry of intrusive visitors
- Schedule meetings in other person’s office



24

6

Avoid taking on  
too much

## Avoid taking on too much



- Set limits
- Say no thank you
- Delegate
- Share work
- Let others help



25

## Time Management Matrix

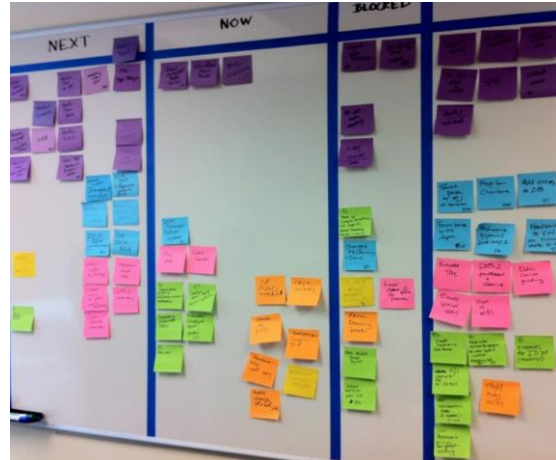
<p><u>Quadrant I: Urgent &amp; Important</u></p> <p>Current % / Desired %</p> <p style="text-align: center;">/</p>	<p><u>Quadrant II: Not Urgent &amp; Important</u></p> <p>Current % / Desired %</p> <p style="text-align: center;">/</p>
<p><u>Quadrant III: Urgent &amp; Not Important</u></p> <p>Current % / Desired %</p> <p style="text-align: center;">/</p>	<p><u>Quadrant IV: Not Urgent &amp; Not Important</u></p> <p>Current % / Desired %</p> <p style="text-align: center;">/</p>



26

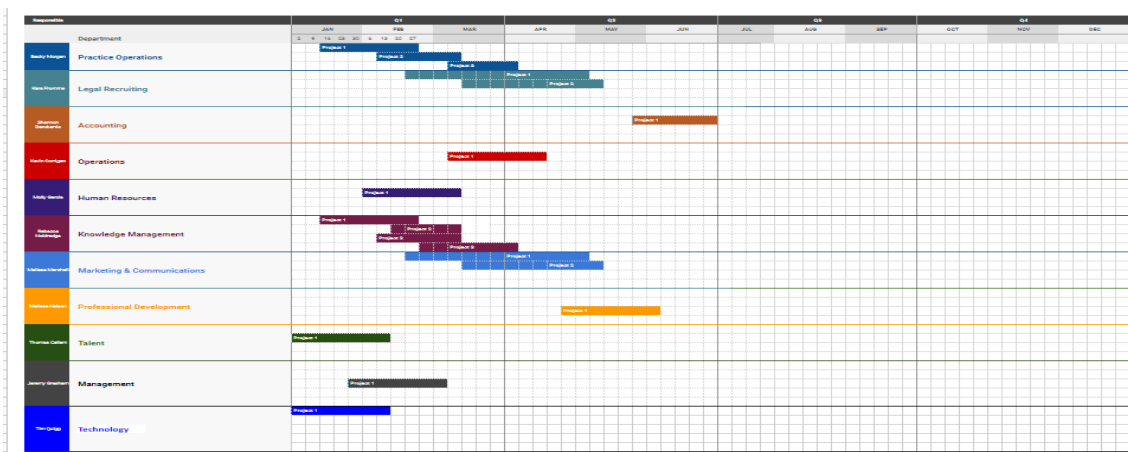
## Kanban Limits WIP

- Before any new item can be introduced, there must be capacity to do the work/task
- If there is no open space, work downstream must be completed to create capacity
- Work is pulled through the system by available capacity, not pushed
- To create capacity, finish what you are doing before you can start something new



27

## Project Management / Gantt Chart



28

## Managing your time...



Increases your success at work, in life



Reduces stress



Enhances balance



29



30