



New Partner Institute

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THE NPI MODULES

INTRODUCTIONS & BUILDING
A STRONG FOUNDATION

PRACTICE MANAGEMENT &
PROCESS IMPROVEMENT

LEADERSHIP

PLANNING FOR SUCCESS



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Planning for Success

4a | Time Management



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There are 1440 minutes in a day.

There are 168 hours in a week.

How will you spend them?



$$24 \times 7 = 168$$

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“Planning is essential. Plans are useless.”

-Winston Churchill



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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.



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The HABU - Highest and Best Use

FOLLOW THE STEPS TO ACHIEVE 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!



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Homework | 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



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Time Management is the Key

- Prioritize and plan
- Live by the calendar – and protect it at all costs
- Focus and prioritize
- Leverage technology

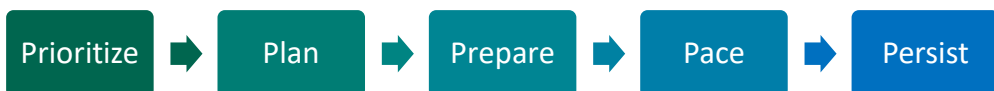


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5 Ps Method

A structured approach to boost your focus and efficiency

- **Prioritize:** Identify what matters most, tackling your most urgent and important tasks first.
- **Plan:** Break down your day or week into actionable tasks. You can use time-blocking via digital calendars like Google Calendar to assign dedicated windows for each item.
- **Prepare:** Gather all your necessary tools, documents, and research before diving into a project so you aren't interrupted by scrambling for materials mid-task.
- **Pace:** Work steadily instead of rushing. Incorporate breaks using the Pomodoro Technique (e.g., working for 25 minutes, then resting for 5) to maintain sustained energy and prevent burnout.
- **Persist:** Stay committed to your schedule. Track your progress and remain adaptable so you can refine your routine when unexpected interruptions occur.



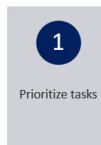
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Steps to managing your time well



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Prioritize: ABC Method



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Prioritization Grid

Eisenhower Matrix

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

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



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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



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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



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C Priorities

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



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Organizing: The to-do list

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Get organized

- Allows prioritizing
- Helps overcome procrastination
- It's a critical starting point - not a stand-alone tool



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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) and adjust as you learn
- Plan a balanced schedule (fixed and flexible tasks)
- Identify odd hours and small bits of time – plan how to use them
- Schedule time for planning prioritizing
- Schedule breaks and time for rejuvenation
- Enter all this somewhere (paper, Outlook, app)



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3-3-3 productivity method

A framework that divides your workday into nine structured focus areas across three core categories:

- **3 hours of deep work:** Dedicate three uninterrupted hours to your most important, high-impact project, ideally during your peak energy window.
- **3 shorter tasks:** Complete three secondary urgent to-dos or pending items (e.g., client follow-ups, document reviews, or meetings).
- **3 maintenance activities:** Handle three administrative or personal tasks that keep your life running smoothly (e.g., clearing your inbox, exercising, or planning the next day).

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Overcome procrastination

- Recognize it
- Evaluate and diagnose it
- 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 root causes/reasons (eg don't like the task, hard to start, fear of failure)
 - Reward yourself for starting and finishing



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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



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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
- Repurpose your work



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Manage disruptions

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Manage 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, make the invisible visual
- Learn to say no: Be polite but assertive
- Set limits: I have five minutes, I can do this tomorrow
- Other tips: Establish available/not available hours, turn off notifications; use Outlook to identify uninterrupted time

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More disruption diffusion tips

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



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Scripted responses to: “Got a Minute?”

The keys: be polite, direct, and offer an alternative time to connect.

- **Quick & Direct**
 - "I'm right in the middle of a project, but I'm free at [Time]. Can I grab you then?"
 - "I have a hard stop right now, but let's connect at [Time]."
 - "Not at the moment, but let's put 10 minutes on the calendar for later today."
- **The "Drop-In"**
 - "I wish I did! I'm on a tight deadline right now. Can we catch up later this afternoon?"
 - "Bad timing—I'm racing to finish something. Let's chat tomorrow morning."
- **Urgent**
 - "I'm completely tied up—is this something that can wait until [Time], or is it an emergency?"



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Avoid taking on too much

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



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Time Management Matrix

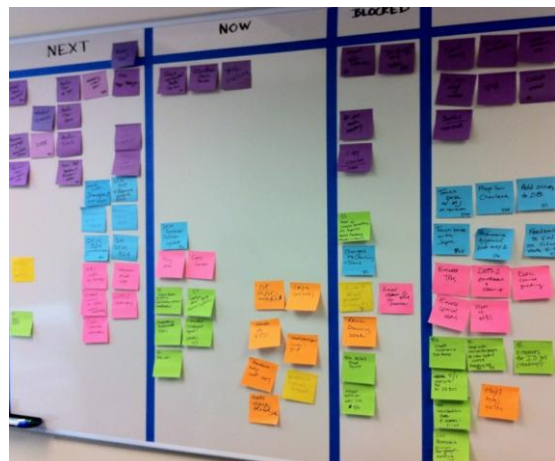
<u>Quadrant I: Urgent & Important</u> Current % / Desired % /	<u>Quadrant II: Not Urgent & Important</u> Current % / Desired % /
<u>Quadrant III: Urgent & Not Important</u> Current % / Desired % /	<u>Quadrant IV: Not Urgent & Not Important</u> Current % / Desired % /



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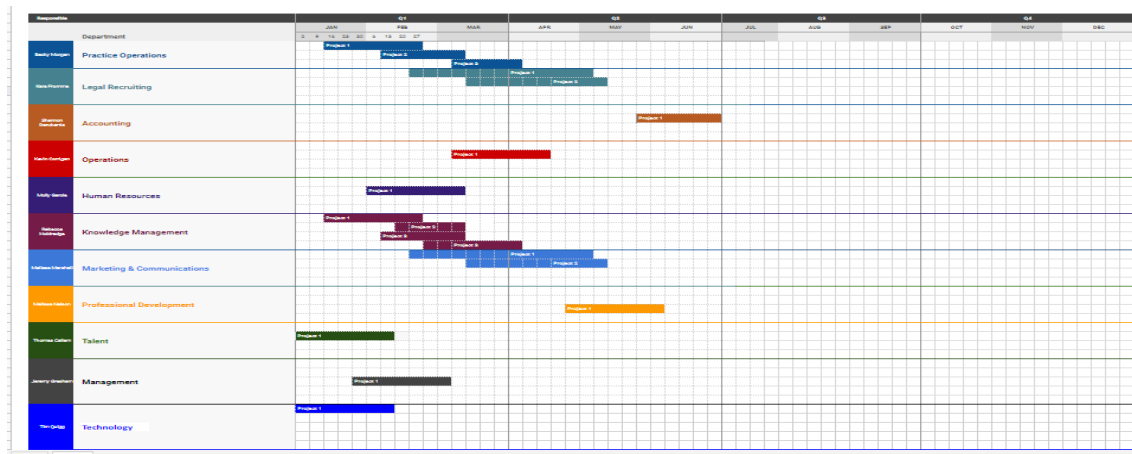
Kanban Limits WIP

- Before any new task can be introduced, there must be capacity to do the work/task
- If there is no open space, work 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



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Project Management / Gantt Chart



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Track your sales activities

[illegible]

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Managing your time...



Increases your success at work, in life



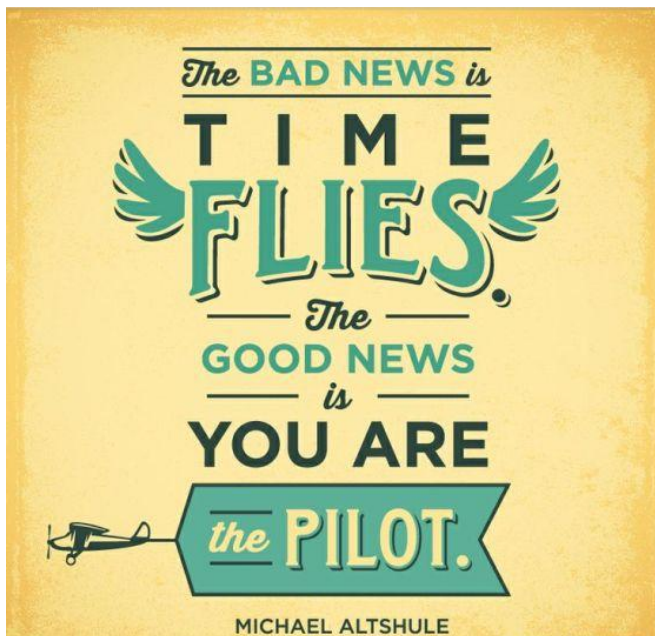
Reduces stress



Enhances balance



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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:

I. 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 or 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.	



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Capstone Meeting (4b)

- Draft your plan
- Be prepared to share ...
 - Your goals
 - The specific kinds of relationships you want to grow
 - Clients
 - Prospects
 - Referral sources



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